



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: 06-11-2025

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 3839 MIS2500000012 1	Change Order No:	Procurement Folder:	1716851
Document Name:	CW Communications Sys. Implementation Phase II		Reason for Modification:	
Document Description:	CW Communications Sys. Implementation Phase II			
Procurement Type:	Central Delivery Order			
Buyer Name:	Crystal G Hustead			
Telephone:	(304) 558-2402			
Email:	crystal.g.hustead@wv.gov			
Shipping Method:	Best Way		Master Agreement Number: CMA 0511 HHR2100000003 1	
Free on Board:	FOB Dest, Freight Prepaid			

VENDOR	DEPARTMENT CONTACT																				
Vendor Customer Code: 000000100150 BERRY DUNN MCNEIL & PARKER LLC 2211 CONGRESS ST PORTLAND ME 04102 US Vendor Contact Phone: 6813138905 Extension: Discount Details: <table><thead><tr><th></th><th>Discount Allowed</th><th>Discount Percentage</th><th>Discount Days</th></tr></thead><tbody><tr><td>#1</td><td>No</td><td>0.0000</td><td>0</td></tr><tr><td>#2</td><td>No</td><td></td><td></td></tr><tr><td>#3</td><td>No</td><td></td><td></td></tr><tr><td>#4</td><td>No</td><td></td><td></td></tr></tbody></table>		Discount Allowed	Discount Percentage	Discount Days	#1	No	0.0000	0	#2	No			#3	No			#4	No			Requestor Name: Kimberly A Beckett Requestor Phone: (304) 558-5906 Requestor Email: kimberly.a.beckett@wv.gov 2025 FILE LOCATION _____
	Discount Allowed	Discount Percentage	Discount Days																		
#1	No	0.0000	0																		
#2	No																				
#3	No																				
#4	No																				

INVOICE TO	SHIP TO
BUYER - 304-957-0209 HEALTH AND HUMAN RESOURCES MANAGEMENT INFORMATION SERVICE ONE DAVIS SQUARE, RM 211 CHARLESTON WV 25301 US	BUYER - 304-957-0209 HEALTH AND HUMAN RESOURCES MANAGEMENT INFORMATION SERVICE 321 CAPITOL ST, STE 200 CHARLESTON WV 25301 US

Total Order Amount: \$437,350.00

Purchasing Division's File Copy

PURCHASING DIVISION AUTHORIZATION

DATE:

ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION

DATE:

ELECTRONIC SIGNATURE ON FILE

Extended Description:

This SOW is to provide project management services to support the implementation of the selected communication system. This will also help the state to meet the Medicaid Information Technology Architecture(MITA)-specific goals.

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$12,150.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2025-06-15	2026-06-14			2025-06-23	

Commodity Line Description: Engagement Manager: Optional Renewal Year Two

Extended Description:

Engagement Manager: Optional Year Two

Hourly Rate: \$270.00 X 45 hours.

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$387,600.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2025-06-15	2026-06-14			2025-06-23	

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

Extended Description:

General Project Manager: Optional Renewal Year Two

Hourly Rate: \$190.00 X2040 hours.

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$37,600.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2025-06-15	2026-06-14			2025-06-23	

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 X 470 hours



May 29, 2025

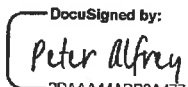
To Whom It May Concern:

Berry, Dunn, McNeil & Parker, LLC (BerryDunn) submitted a Staffing Plan and Scope of Work (SOW) document to assist the West Virginia Department of Human Services (DoHS) by providing support for the Child Welfare (CW) Communication System Implementation Phase II Project under our master contract (CMA HHR21*03). As stated in the SOW document, the duration of this work is estimated to be 13 months. BerryDunn agrees to a SOW start date effective June 15, 2025.

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

Please let me know if you have any questions or if you would like to discuss the content in this SOW. We are pleased to have the opportunity to provide these important services to the State of West Virginia.

Best Regards,

DocuSigned by:

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

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

300 Capitol Street • Suite 1610 • Charleston, WV 25301 • t. 681.313.8900 • berrydunn.com



West Virginia Department of Human Services

Child Welfare Communication System Implementation Phase II

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

Brandon Milton, MBA, PMP®, Principal
Berry, Dunn, McNeil & Parker, LLC
bmilton@berrydunn.com

Submitted On:

May 29, 2025



Staffing Plan and Scope of Work for the West Virginia Department of Human Services (DoHS) Child Welfare (CW) Communication System Implementation Phase II

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) with project management services for the implementation of a child welfare (CW) communications system. The work completed under the WV CW Communication System Implementation Project Phase II will be in accordance with the terms and conditions of the Centralized Master Agreement (CMA) HHR 21*03 Bureau for Medical Services (BMS) Project Management Services contract between BerryDunn 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, as detailed in the sections below, in preparing this SOW.

1.1 Key Information

BerryDunn understands that the State is procuring a CW communications system to help improve communication across teams of people who support children in foster care as outlined in House Bill 4975 Subsection (b)(1) through (b)(3).

BerryDunn recently supported the State with the procurement phase of this project by gathering requirements (including developing functional and technical requirements), developing a request for proposal (RFP) for the solicitation, and facilitating vendor evaluations.

As the State approaches the selection of a CW communication system vendor, BerryDunn will continue to support the State as it transitions into the implementation phase of this project. This support will include providing project management services and advisement for the State team during the CW communication system implementation and partnering with the CW communication system vendor throughout implementation. Our approach employs project management best practices that will support monitoring, managing, and reporting on CW communication system implementation and delivery.

The objective of this project is to provide project management services to support the implementation of the selected communications system. The CW Communication System Implementation Project will also help the State meet Medicaid Information Technology Architecture (MITA)-specific goals, such as the following:

- Develop seamless and integrated systems that communicate effectively to achieve common Medicaid goals through interoperability and common standards
- Promote an environment that supports flexibility, adaptability, and rapid response to changes in programs and technology
- Promote efficient and effective data sharing to meet stakeholder needs
- Provide a beneficiary-centric focus



- Promote secure data exchange
- Promote good practices

1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- The State leadership team will consist of Brandon Lewis, director of the Office of Enterprise Systems.
- 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 Andrea Richardson as project manager, Alex Tannenbaum as program manager, and Brandon Milton as portfolio manager.
- This work will begin upon approval of this SOW—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 placed on the State-designated site and brought to the attention of the State project sponsor.
- Deliverables will be provided in an agreed-upon format.
- State project team members will report issues promptly so they may be recorded in the backlog or identified as a risk to the completion of the project plan.
- The State and implementation vendor project team members will be available for a weekly meeting to review backlog items, implementation status, and project plan progress.
- Participating State agencies will provide their staff with the knowledge base required to inform implementation activities as needed. BerryDunn assumes the list of participating agencies will consist of the DoHS Office of the Secretary, the Office of Shared Administration (OSA), BMS, the Bureau for Social Services (BSS), and the West Virginia Office of Technology (WVOT).
- The vendor will perform impact assessments in coordination with the WV People's Access to Help (PATH) team to promptly identify additional costs, scope considerations, and duration information. Any scope, schedule, or budget changes beyond what is identified in this SOW may require a change request to this SOW or a separate SOW.
- The State project lead and other relevant State participants will attend biweekly leadership meetings to review project status and mitigate risks and issues.
- The staffing, approach, and level of effort defined in this SOW are based on the requirements outlined within the State's CW Communication System Implementation RFP.
- BerryDunn's approach to supporting this work may include several team members from the PATH project team and the Project Management Support Staff team. As such, multiple team



members are listed to ensure timely support if/when needed. Table 2 reflects this approach.

- This work will be performed in accordance with the federal clauses, including, but not limited to, the ones listed in Appendix A.

1.3 Project Funding

The State intends to utilize the FFY 2025 PATH As-Needed Implementation Advance Planning Document (IAPD) WV-2024-12-03 for this SOW. The Centers for Medicare & Medicaid Services (CMS) previously approved the PATH As-Needed IAPD on February 5, 2025, for total state and federal funds in the amount of \$113,452,799, under project identifier WV-2024-12-03 and WV-2024-12-06 IES-IAPD. The estimated cost of the services delivered under this SOW is \$437,350.00 (included in the approved Advance Planning Document [APD]). Therefore, any additional scope added to the services provided under this SOW may require the State to update its PATH IAPD to allocate additional funds for project management.



2.0 Project Scope and Staffing Plan

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

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

Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	<p>Engagement Oversight</p> <p><i>Service Approach</i></p> <p>BerryDunn's leadership team will provide oversight and coordination of BerryDunn staff, services, and deliverables.</p> <p>BerryDunn's project leadership will 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"> D01: Commissioner Briefing <p><i>Completion Criteria</i></p> <p>All parties will deem Engagement Oversight complete upon completion of project closeout meeting and acceptance of the final monthly status report (MSR) by the project sponsor or their designee.</p>	<p>Brandon Milton</p> <p>Andrea Richardson</p> <p>Alex Tannenbaum</p>	180
2.0	<p>Project Execution and Control</p> <p><i>Service Approach</i></p> <p>Upon project initiation, BerryDunn will host a project kickoff meeting. In support of Project Execution and Control, BerryDunn's leadership will 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 the following activities:</p> <ul style="list-style-type: none"> Facilitating meetings, preparing meeting materials, and taking notes for BerryDunn- and State-owned meetings Preparing monthly project status updates, risks, issues, and briefings for the State leadership team 	<p>Brandon Milton</p> <p>Andrea Richardson</p> <p>Alex Tannenbaum</p> <p>Annie Messinger</p> <p>Danni Ricks</p> <p>Mallary Tiffany</p> <p>Morgan Krieger</p> <p>Rosie Racer</p> <p>Skye Kwong</p> <p>Alycia Minshall</p> <p>Caitlin Cabral</p> <p>Carole Ann Guay</p> <p>Grace Min</p> <p>Jonathan Williams</p>	985



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> Managing project logs (action item, decision, issue, and risk tracking) Storing project documentation in an agreed-upon SharePoint location Facilitating a Project Closeout Meeting prior to the end of the project. Reporting the project closeout activities in the MSR. <p>Deliverable(s)</p> <ul style="list-style-type: none"> D02: Monthly Status Report D03: Action Item, Risk, Issue, and Decision Logs <p>Completion Criteria</p> <p>All parties will deem Project Execution and Control complete upon completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.</p>	<p>Jordan Ramsey KD Dobyne Megan Hamilton</p>	
3.0	<p>Requirements Management Subject Matter Expertise</p> <p>Service Approach</p> <p>BerryDunn will provide project management services to support the requirements analysis and system design, development, and implementation (DDI) phases of the project.</p> <p>During the requirements analysis and system DDI phases, BerryDunn will work with the State to review the vendor's proposed solution for RFP requirements (inclusive of proposed gaps). After the requirements review, the project team will work with the vendor to refine and validate the solution for each requirement.</p> <p>BerryDunn will also be responsible for meeting attendance, facilitation, and/or note-taking (when requested by the State) during discussions in which requirements may be impacted.</p> <p>Although the vendor will be responsible for conducting requirements analysis, clarifying the scope of the solution, and maintaining a requirements traceability matrix (RTM), BerryDunn will be responsible for helping ensure the RTM reflects the State and the vendor's agreed-upon solution.</p> <p>Outputs</p> <p><i>The following outputs will be produced as part of this service:</i></p>	<p>Andrea Richardson Annie Messinger Danni Ricks</p>	350



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> Action item tracking reports Research summaries (as requested) Impact analyses (as requested) <p><i>Completion Criteria</i></p> <p>All parties will deem Requirements Management Subject Matter Expertise complete upon completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.</p>		
4.0	<p>Deliverable Management and Review</p> <p><i>Service Approach</i></p> <p>BerryDunn will employ its standardized approach to monitoring and providing management oversight for the quality of project deliverables, artifacts, and other vendor-submitted work products. BerryDunn's approach will consist of the following elements:</p> <ul style="list-style-type: none"> Facilitate, track, and manage vendor- and Project Management Office (PMO)-owned deliverables (project deliverables will be stored in an agreed-upon location). Develop, review, and finalize deliverable acceptance criteria with the vendor and State. Participate in vendor-facilitated draft reviews of contract deliverables (as needed). Review vendor-owned contract deliverables for alignment with acceptance criteria and contract requirements. Participate in vendor-facilitated formal reviews of contract deliverables (as needed). Collaboratively resolve comments on vendor-owned deliverables. Create and obtain signature approval on each PMO- and vendor-owned project deliverable. <p>BerryDunn will review vendor deliverables for quality, comprehensiveness, and alignment with project requirements. In support of this objective, BerryDunn will work with the vendor to help ensure deliverables have approved acceptance criteria that the State has validated. BerryDunn will also work with the State and the vendor to help ensure project deliverables align with the State-approved acceptance criteria. The team will also use the agreed-upon comment logs to track identified comments in project deliverables, working collaboratively to resolve identified comments.</p>	<p>Andrea Richardson</p> <p>Annie Messinger</p> <p>Danni Ricks</p> <p>Morgan Krieger</p> <p>Mallory Tiffany</p> <p>Rosie Racer</p> <p>Alycia Minshall</p> <p>Caitlin Cabral</p> <p>Carole Ann Guay</p> <p>Grace Min</p> <p>Jonathan Williams</p> <p>Jordan Ramsey</p> <p>KD Dobyne</p> <p>Megan Hamilton</p>	615



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>Once the deliverable has been finalized, BerryDunn will create and obtain signature approval on each PMO- and vendor-owned project deliverable and milestone through a deliverable acceptance form (DAF).</p> <p><i>Outputs</i></p> <p>The following outputs will be produced as part of this service:</p> <ul style="list-style-type: none"> • Deliverable comment logs • Deliverable review tracking logs • Deliverable review training materials • Deliverable review Responsible, Accountable, Consulted, and Informed (RACI) Matrix <p><i>Completion Criteria</i></p> <p>All parties will deem Deliverable Management and Review complete upon completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.</p>		
5.0	<p><i>Testing Support</i></p> <p><i>Service Approach</i></p> <p>BerryDunn will provide resources to assist DoHS with System Integration Testing (SIT), User Acceptance Testing (UAT), and Operational Readiness Testing (ORT) efforts. Assistance during SIT, UAT, and ORT is outlined as follows:</p> <ul style="list-style-type: none"> • BerryDunn will assist DoHS with the review of SIT cases and results. BerryDunn will also support monitoring SIT defects and the impacts on overall project health. • BerryDunn will maintain the UAT Plan and assist DoHS in developing UAT test scenarios. • BerryDunn will assist the State with coordinating and facilitating UAT and tracking UAT outcomes, issues, and defects identified during this testing phase. • BerryDunn will assist DoHS with facilitating and validating the vendor's services related to ORT. • BerryDunn will also be responsible for services necessary to assist DoHS in validating that it is operationally ready for the system go-live. <p>To help ensure the requirements are representative of the State and the vendor's agreed-upon solution, BerryDunn's assigned track leads will assist each program through the testing effort. These individuals will be the primary points of contact for each testing area and will work with BerryDunn and the vendor to define, clarify, and test each requirement's design.</p> <p><i>Outputs</i></p>	<p>Andrea Richardson</p> <p>Alex Tannenbaum</p> <p>Mallary Tiffany</p> <p>Morgan Krieger</p> <p>Rosie Racer</p> <p>Marcharda Walters-White</p>	240



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> DoHS UAT Plan SIT test cases, SIT test results, and UAT test case review comment logs UAT templates (e.g., test case scenarios) UAT execution reporting (e.g., overall UAT status, defect tracking) <p><i>Completion Criteria</i></p> <p>All parties will deem Testing Support complete upon completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.</p>		
6.0	<p>Organizational Change Management (OCM)</p> <p><i>Service Approach</i></p> <p>Organizational change is a fundamental component of most system implementations. As such, BerryDunn will work with DoHS on developing and implementing a change management methodology that aligns with accepted change management principles. In alignment with a proven methodology, BerryDunn's approach to providing change management in its work with DoHS will occur over the course of three stages:</p> <ul style="list-style-type: none"> Preparing for Change begins with developing a Change Management Plan based on input from DoHS leadership and stakeholders regarding the existing environment, Managing Change involved overseeing assigned roles and tasks, providing training and coaching, using tools effectively, and exercising clear communication. Reinforcing Change involves evaluating action plans, reviewing the sustainability of change management activities, and promoting individual and team successes. <p>BerryDunn anticipates that the project's Change Management Plan will be updated as needed.</p> <p><i>Output</i></p> <ul style="list-style-type: none"> Updated Change Management Plan <p><i>Completion Criteria</i></p> <p>All parties will deem Organizational Change Management complete upon completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.</p>	<p>Andrea Richardson Alex Tannenbaum Annie Messinger Danni Ricks Marcharda Walters-White Morgan Krieger Rosie Racer</p>	185
Total Hours			2,555
Total Not-To-Exceed Cost Estimate			\$437,350



3.0 Project Resources and Hours

Table 2 displays additional staffing plan details, total hours, and costs by resource based on hourly rates/staffing classifications in the Commodity Lines (CLs) for Optional Year 2 in CMA HHR 21*03. The following rates were used to compute the costs in the table:

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

Table 2: Project Resources Estimated Hours and Total Cost

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
Core Project Team					
15	EM	\$270	Brandon Milton	45	\$12,150
17	GPM	\$190	Andrea Richardson	455	\$86,450
17	GPM	\$190	Alex Tannenbaum	245	\$46,550
17	GPM	\$190	Annie Messinger	350	\$66,500
17	GPM	\$190	Danni Ricks	370	\$70,300
17	GPM	\$190	Marcharda Walters-White	250	\$47,500
18	SS	\$80	Skye Kwong	175	\$14,000
PATH Support Team					
17	GPM	\$190	Mallory Tiffany	185	\$35,150
17	GPM	\$190	Morgan Krieger	185	\$35,150
18	SS	\$80	Rosie Racer	275	\$22,000
Project Management Support Staff					
18	SS	\$80	Alycia Minshall Caitlin Cabral Carole Ann Guay Grace Min Jonathan Williams Jordan Ramsey KD Dobyne Megan Hamilton	20	\$1,600
Total				2,555	\$437,350



4.0 Project Hours and Costs Per Month

Table 3 below displays an overview of the project hours and estimated costs per month over the lifetime of the project.

Table 3: Estimated Project Costs by Month

Month	EM Hours	GPM Hours	SS Hours	Est. Hours Per Month	Est. Cost Per Month
Month 1	5	243	40	288	\$50,720
Month 2	5	243	40	288	\$50,720
Month 3	4	243	39	286	\$50,370
Month 4	3	217	39	259	\$45,160
Month 5	3	217	39	259	\$45,160
Month 6	3	145	39	187	\$31,480
Month 7	3	145	39	187	\$31,480
Month 8	3	140	39	182	\$30,530
Month 9	3	125	39	167	\$27,680
Month 10	5	125	39	169	\$28,220
Month 11	3	125	39	167	\$27,680
Month 12	2	36	20	58	\$8,980
Month 13	3	36	19	58	\$9,170
Total	45	2040	470	2555	\$437,350



5.0 High-Level Timeline

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

Figure 1: Proposed High-Level Timeline

Task	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12	Month 13
1.0 Engagement Oversight													
2.0 Project Execution and Control													
3.0 Requirements Management Subject Matter Expertise													
4.0 Deliverable Management and Review													
5.0 Testing													
6.0 OCM													



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
20AAA44ABB3A477...

Signature

5/29/2025

Date

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

[Handwritten Signature]

Signature

6/5/2025

Date

Agreed

Heather White



Appendix A: Federal Clauses

Americans with Disabilities Act

This Act (28 CFR [Code of Federal Register] Part 35, Title II, Subtitle A) prohibits discrimination based on disability in all services, programs, and activities provided to the public and State and local governments, except public transportation services.

Drug-Free Workplace Statement

The Federal government implemented 41 U.S. Code § 8103, Drug-free workplace requirements for Federal grant recipients to address the problems of drug abuse on the job. It is a fact that employees who use drugs have less productivity, a lower quality of work, and a higher absenteeism, and are more likely to misappropriate funds or services. From this perspective, the drug abuser may endanger other employees, the public at large, or themselves. Damage to property, whether owned by this entity or not, could result from drug abuse on the job. All these actions might undermine public confidence in the services this entity provides. Therefore, to remain a responsible source for government contracts, the following guidelines have been adopted:

1. The unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited in the workplace.
2. Violators may be terminated or requested to seek counseling from an approved rehabilitation service.
3. Employees must notify their employer of any conviction of a criminal drug statute no later than five days after such conviction.
4. Contractors of federal agencies are required to certify that they will provide drug-free workplaces for their employees.

Transactions subject to the suspension/debarment rules (covered transactions) include grants, subgrants, cooperative agreements, and prime contracts under such awards. Subcontracts are not included.

Royalty-Free Rights to Use Software or Documentation Developed

2 CFR 200.315 Intangible property.

- a) Title to intangible property (see §200.59 Intangible property) acquired under a Federal award vests upon acquisition in the non-Federal entity. The non-Federal entity must use that property for the originally authorized purpose and must not encumber the property without approval of the Federal awarding agency. When no longer needed for the originally authorized purpose, disposition of the intangible property must occur in accordance with the provisions in §200.313 Equipment paragraph (e).
- b) The non-Federal entity may copyright any work that is subject to copyright and was developed, or for which ownership was acquired, under a Federal award. The Federal



awarding agency reserves a royalty-free, nonexclusive and irrevocable right to reproduce, publish, or otherwise use the work for Federal purposes, and to authorize others to do so.

- c) The non-Federal entity is subject to applicable regulations governing patents and inventions, including government wide regulations issued by the Department of Commerce at 37 CFR Part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Awards, Contracts and Cooperative Agreements."
- d) The Federal Government has the right to:
 - 1) Obtain, reproduce, publish, or otherwise use the data produced under a Federal award; and
 - 2) Authorize others to receive, reproduce, publish, or otherwise use such data for Federal purposes.



Appendix B: Resumes

Brandon Milton, MBA, PMP®, Prosci® CCP

PRINCIPAL

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

MBA, University of New
Hampshire

BS, Business
Administration and
Political Science,
University of Maine

Certified Project
Management
Professional®, Project
Management Institute®

Prosci® Certified Change
Practitioner

PROPOSED PROJECT ROLE

Engagement Manager

MEDICAID EXPERIENCE

10 Years

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

KEY QUALIFICATIONS

Experience with MMIS procurement, implementation and certification (WV, NJ, AK)

Experience with Medicaid eligibility audits, certification and business process redesign (HI, AK, MO)

Medicaid Eligibility and Enrollment Toolkit (MEET) experience

Experience with organization development for Medicaid agencies (HI)

Over 10 years of government consulting experience

RELEVANT EXPERIENCE

BerryDunn (07/2011 To Present)

Hawaii Department of Human Services

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

Brandon is currently serving in the role of project principal for a business process redesign effort for the customer-facing sections of Hawaii's Med-QUEST Division. His work includes identifying opportunities for the State to leverage their new Medicaid eligibility determination system to improve efficiency and the customer experience.

Alaska Division of Health Care Services (HCS)

MMIS Fiscal Agent Solicitations Consultant Serves (09/2020 to present)

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



New Jersey Division of Medical Assistance and Health Services

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

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

West Virginia Bureau for Medical Services

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

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

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

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

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



- Planning and quality assurance reviews of CMS certification evidence
- Planning and execution of operational readiness testing
- Oversight of service level agreements and system performance in operations

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

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

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

Provider Enrollment (PEA) Project

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

Missouri Department of Social Services

Missouri Eligibility Determination and Enrollment System (MEDES) IV&V Services

Brandon provided project management oversight and subject matter expertise for the development of evidence packets for CMS gate reviews of MEDES. This work included identification and validation of system evidence to align with the checklist criteria from the new Medicaid Eligibility and Enrollment Toolkit (MEET) that CMS released in August of 2017.

Office of U.S. Senator Susan M. Collins (2007 to 2010)

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

PUBLICATIONS



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



Andrea Richardson, Prosci®, LSSGB

MANAGER

Berry, Dunn, McNeill & Parker, LLC



EDUCATION AND CERTIFICATIONS

BS, Family Studies,
University of Connecticut

Prosci® Certified Change
Practitioner

Lean Six Sigma Green Belt
(LSSGB)

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

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

10 years

Andrea Richardson is an experienced professional with experience in human services system integration and design, organizational tool and training design for large human services agencies, and technology development as it relates to human services. 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 of Social Services

Consulting Services for the Implementation of a Communication System (02/2025 to present)

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

Consulting Services for the Development of an RFP (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 in WV. 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 the requirements of the WV HB4975.

Consulting Services for the 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 WV by improving the use of the CCRL and CMCRS services statewide. As a SME, Andrea works with WV 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 (EM) 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 (EM) 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 a 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.

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 (EM) 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 to engage both the BerryDunn and MN DCYF and Department of Human Services (DHS) to capture the vision of the departments and engage interested parties to 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.

Iowa Department of Health and Human Services (IA HHS)

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 a RFP for IA HHS procurement of a solution for their SNAP/FIP services. As the PM, Andrea manages the scope and budget of the project, maintains consistent communication with the 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.

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)

Andrea is serving as engagement manager on this project facilitating department leadership discussions, engaging state and interested parties, performing research, providing CCWIS SME, and leading the development of business process maps for the state procurement of a new child welfare case management system. She is providing guidance to the 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 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 (EM) 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 serves as human services and child welfare subject matter expert for the BerryDunn team that is 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.

Kentucky Department for Aging and Independent Living (DAIL)

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

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

Alaska Department of Family and Community Services (DFCS)

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

Andrea served as project manager and as senior business analyst on this project, which includes 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.

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)

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.

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 nonprofit leaders. She designed and created a bimonthly newsletter, *The Smarter Non-Profiter*, which provides resources for nonprofit leaders. She create no-going training and webinars to assist nonprofit leaders in professional development skills that support nonprofit 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 (OMHSAS), and Office of Children, Youth, and Families (OCYF) to develop integrated support plans and services for families and to improve the delivery of state and local Medicaid and other federally funded programs. Andrea provided consultation regarding current policies and statewide legislation to counties and regional Office of Children, Youth, and Families offices to assess and provide technical assistance to counties to assist in the improvement of child welfare practice outcomes specifically around family engagement, system integration and system reform.

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

Pennsylvania's Single State Medicaid Agency

Andrea served as the System of Care (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-dollar fiscal plan, and supported OCYF and OMHSAS in all phases of the local and national evaluation including tool design, outcome, and measurement determination and analysis. Andrea 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. re 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 nonprofit budget of over \$3 million dollars, designed, implemented clinical programs for people supported, and monitored the quality of services within licensing guidelines and agency mission.

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 system.

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 nonprofit 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 manual for pediatricians. She provided behavioral consultation, information referral, outreach and training to families and communities in need. She worked with 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 nonprofit 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.



Alex Tannenbaum

MANAGER

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BS, Clemson University

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

4 years

Alex is a Manager in BerryDunn's Medicaid Practice Group. He brings six years of project, resource, and client management experience with Medicaid agencies to the group. Alex's positive energy, excellent organization and communication skills, and professionalism nicely complements his current work on multiple eligibility and enrollment projects, where he is responsible for providing project management organization services.

KEY QUALIFICATIONS

8 years diverse management experience, including resource and client management

8 years' experience solutioning project and resource needs for clients

9 years' experience supporting clients in government, nonprofit, and private sectors

RELEVANT EXPERIENCE

BerryDunn (09/2020 to Present)

West Virginia Department of Human Services (DoHS)

People's Access to Help (PATH) (09/2020 to present)

Currently Alex is the Project Manager for a large-scale, system implementation project directly impacting four agencies in West Virginia. Alex oversees a 40-person team, managing a service approach for the PATH project which includes oversight, monthly project reporting, project management support, requirements management, deliverable management and review, federal review and certification support, testing support, organizational change management (OCM) support, and project closeout.

Alex is also the lead for the project's multi-program Implementation Advance Planning Document (IAPD) Updates. In addition to submitting narrative updates for the IAPD, Alex is also responsible for updating the project's Cost Allocation Methodology (CAM), which follows the International Function Point Users Group's (IFPUG) Function Point Counting Practices Manual.



Previously, Alex served the Internal Project Management Office Manager, where he was responsible for managing the following work streams: Project Schedule, Project Scope, PMO Tool Management, Monthly Status and Readiness Reporting, Budget, Deliverables, Compliance, System Security, Certification, Issues, Risks, Action Items, Assumptions, Decisions (IRAAD), Audits, Project Resources, Internal Governance, and Project Communications.

WV APD Consulting Services (05/2023 to present)

Alex provides subject matter expertise regarding APDs, inclusive of relevant CFR knowledge, cost allocation, and overall APD narrative and updates.

Iowa Department of Health and Human Services

Alex supports Iowa's single state Medicaid agency, the Department of Human Services as a PM.

ELIAS Phase 2 Governance and Project Management Support (10/2024 to present)

As Project Manager for the ELIAS project with the Iowa Department of Health and Human Services, Alex provides risk-informed project oversight, strategic planning, and quality assurance to support the implementation and management of ELIAS, an integrated eligibility system for Medicaid, CHIP, and other programs. Alex facilitates project governance, coordinates backlog prioritization, and delivers project management services, including tracking progress, managing budgets, and monitoring compliance with federal requirements. By leveraging tools like Azure DevOps, Alex ensures efficient backlog management and alignment with project outcomes, while spearheading executive leadership meetings and reporting to maintain transparency and accountability.

ELIAS Phase 1 Assessment (01/2024 to 09/2024)

As PM for the ELIAS Assessment project with the Iowa Department of Health and Human Services, Alex leads project oversight and coordination, delivering strategic planning, quality assurance, and project management services. Alex spearheads the development of a multiyear project plan and Project Management Plans (PMPs), ensuring effective implementation and system enhancements of the Accenture Human Services Suite (AHHS) while supporting an overall strategy to streamline operations and reduce costs.

TEKsystems (06/2016 to 09/2020)

Alex managed over six enterprise accounts concurrently, generating over \$6M in revenue. He managed project deliverables and timelines, as well as negotiated terms, conditions, and pricing. He was responsible for working with key IT stakeholders, C-level executives, and clinical leaders to identify upcoming business initiatives and establish and implement solution strategies. He solutioned in areas of Traditional Software Development (Systems Development Life Cycle (SDLC) and Agile), Cloud Enablement, Data Analytics, DevOps and Automation, and Digital Experience. Industries supported included Healthcare (Medicaid, IES, EMR, and Insurance), Pharmaceutical/Life Science, and State/Local Government.

Alex was responsible for securing business with new accounts to provide IT Project-based Services and IT Staffing Services and to Life Science and Pharmaceutical clients. This includes engaging new and existing customers through phone calls and meetings to promote TEKsystems as a valued partner for IT services such as deliverable-based professional services, workforce planning, and staff augmentation. He identifies new customers within a sales territory through research and networking to expand TEKsystems business opportunities; secures high-value accounts through consultative selling, effective customer solutions, and compelling business opportunities; and negotiates contracts and integrate contract requirements with business operations.

He was also responsible for relationship management, building client relationships to understand their business/analyze service growth opportunities. This has included leading strategic business plan implementation to address customer needs and position TEKsystems as a service provider.



Annie Messinger, PMP®, LSSGB, Prosci® CCP

MANAGER

Berry, Dunn, McNeil & Parker, LLC



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

EDUCATION AND CERTIFICATIONS

BA, University of Southern
Maine

Prosci® Certified Change
Practitioner

Certified Project
Management
Professional® (PMP®)

Lean Six Sigma Green Belt
(LSSBG)

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

6 years

KEY QUALIFICATIONS

- Six years' experience in child welfare project management with the West Virginia Department of Human Services (DoHS), including strategic planning, budget forecasting, gap analysis, continuum of care service implementation, OCM, risk management, monthly reporting, business process improvement, and organizational effectiveness in lessons learned
- More than 15 years leading and advising various stakeholder groups from youth service organizations and agencies as a change ambassador and resource development professional
- More than a decade serving Boys & Girls Clubs in Portland, Maine, leading resource development, marketing, and brand protection while working with a 40-member board of directors and cultivating hundreds of volunteers from advisory boards and 100+ Corporators to numerous volunteers and donors for fundraising events and campaigns
- More than 15 years collaborating with federal agencies, most recently with the U.S. Department of Justice (DOJ)

PROJECT EXPERIENCE

BerryDunn (10/2018 to present)

West Virginia Bureau for Medical Services (BMS)

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

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

West Virginia Bureau for Social Services



Child Welfare Initiatives Project (05/2019 to present)

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

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

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

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

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

West Virginia Bureau for Public Health (BPH)

Public Health Accreditation Preparation Project (12/2018 to 06/2019)

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

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

Business Process Redesign (BPR) Project (05/2024 to present)

Annie is Project Manager of producing useful tools as Montana prepares for a comprehensive child welfare information system (CCWIS) implementation. Annie facilitated discovery sessions and created current state process maps, worked with Montana's project leads and BerryDunn's marketing team to devise three journey maps depicting Montana's older youth in foster care, tribal partners, and foster and kinship parents/guardians, to help Montana present its

CCWIS project's mission, vision, and goals to external stakeholders. Annie led an assessment of Montana's system training, agency-wide communication, and OCM structure, along with a gap analysis of current processes to help inform Montana's CCWIS planning and future implementation.



Kentucky Department of Aging and Independent Living

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

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

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

Consulting Services for a Workforce Development Needs Assessment (08/2023 to 01/2024)

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

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

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

Wayfinder Schools (03/2017 to 01/2018)

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

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

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

Annie executed \$3 million capacity campaign to augment five-year budget forecast, with dynamic campaign committee and more than 140 donors over three years. She supervised and reviewed Development Coordinator, part-time Grants Coordinator and Administrative Assistant. She worked daily with 38 board trustees of all personalities, industries and work styles, to accomplish mission and strategic goals. She managed six annual fundraising events including a historical spring auction that grossed over six figures, and two in partnership with large community partner. She worked with the following trustee-led committees: Executive, Capacity Campaign, Steering, Strategic Planning, Resource Development, Investments, Finance, Marketing, Human Resources, Program, State Alliance and seasonal events. She collaborated with board and adjunct committee members on five-year strategic plan – implemented and actively worked to execute strategic plan. She implemented



quarterly scoreboard measurements of marketing initiatives, ranging from event guests and volunteers to long-term donors. She was responsible for fundraising database management and reporting, requiring extensive manipulation of information from Raiser's Edge software. She cultivated, secured and stewarded major gifts, collaborated with planned giving advisors and donors to grow \$10 million endowment, and institutionalized annual resource development goals.

Development Director (09/2006 to 05/2012)

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



Danni Ricks, PMP®, Prosci® CCP,
LSSGB

SENIOR CONSULTANT
Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND
CERTIFICATIONS

Regents BA, Minors in
Health Promotion and
Professional Writing,
West Virginia University
Coursework in Human
Services and Education
at Virginia Tech
Certified Project
Management
Professional® (PMP®)
Lean Six Sigma Green
Belt
Prosci® Certified Change
Practitioner
Medicaid Learning Center
(MLC) Certified Medicaid
Professional (HIT +
MCMP-II)
WV Infant and Toddler
Specialist (WVIT
Certification)

PROPOSED PROJECT
ROLE

General Project Manager

MEDICAID EXPERIENCE

6 years

Danni Ricks is a senior consultant in BerryDunn's Public Health Practice. She is a certified Project Management Professional® (PMP®), Prosci® Change Management Professional, and Lean Six Sigma Green Belt. She has proven leadership experience in project management, vendor management, and process mapping and redesign. She also has expertise in RFP and requirements development, and well-versed in meeting and workgroup organization and facilitation.

PROJECT EXPERIENCE

BerryDunn (11/2018 To Present)

Iowa Department of Health and Human Services

Child Care System Procurement Assistance (01/2025 to present)

Danni is project manager on this project to gather requirements, develop a request for information, and support the procurement process for the State to obtain a new child care system.

West Virginia Bureau for Public Health

*Women, Infants, and Children (WIC) Crossroads User Group (XRUG)
Product Management Office (PMO) (06/2020 to present)*

The WIC PMO project provides product support and vendor facilitation for the maintenance and enhancement of the Crossroads system. The PMO provides support for the XRUG which includes WV, Virginia, Alabama, and Rhode Island. The PMO supports each states individual needs through connecting systems such as vaccination databases, Medicaid Management Information Systems (MMIS), farmers market and Electronic Benefits Transfer (EBT) systems as necessary. Danni leads the WIC PMO as product manager with business analysis, including governance document review, RFP support, process improvement, and strategic planning. Danni also offers vendor facilitation and project management for the XRUG.

Newborn Screening Process and Procedure Development (01/2024 to 06/2024)

As project manager, Danni was responsible for overseeing the development and delivery of project deliverables including state best practice research, process maps, and procedure guides. She worked collaboratively with the client to coordinate project meetings, complete process review, provide recommendations, and help ensure the client meets legislative requirements for process and procedure review.



Tobacco Quitline RFP Project Management (09/2023 to 06/2024)

As project manager, Danni was responsible for overseeing the development and delivery of project deliverables including state best practice research, recommended requirements, RFP, and scoring requirements. She works collaboratively with the client to coordinate project meetings and monitor progress toward the release of the RFP. The Tobacco Quitline RFP included requirements to serve uninsured, underinsured, and Medicaid recipients in WV.

Infant and Maternal Mortality Review Panel Project Management Support (04/2023 to 10/2023)

As deputy project manager, Danni collaborated with the project manager to oversee the development and delivery of project deliverables including state best practice research, process maps, and procedure guides. She worked collaboratively with the client to coordinate project meetings and monitored progress toward established project goals.

Emergency Medical Services Data System Post-Implementation Support (05/2022 to 12/2022)

Danni served as the project manager for the Office of Emergency Medical Services (OEMS) data system post-implementation project. The project involves the review and revision of OEMS policies and procedures. She provides support for business process redesign through business analysis, process mapping (as-is and to-be), and process redesign. Danni also monitors compliance with the vendor contract requirements and negotiates the workload for the understaffed OEMS. As part of vendor management, she mitigates risks and issues as they arise to ensure the project will be completed on time and to the satisfaction of OEMS.

Emergency Medical Services Data System Implementation Support (02/2021 to 04/2022)

Danni served as the deputy project manager for the OEMS data system implementation project. The project involves the implementation of a new emergency patient care record and license management system. She monitors compliance with the vendor contract requirements and negotiates the workload for the understaffed OEMS. As part of vendor management, she mitigates risks and issues as they arise to ensure the project will be completed on time and to the satisfaction of OEMS.

Children with Special Health Care Needs Business Process Redesign and Procedure Manual Completion (CSHCN) (04/2020 to 01/2021)

The CSHCN project provided support for business process redesign and procedure manual completion for the program to align with national standards. Danni supports the CSHCN project with business analysis, process mapping (as-is and to-be), process redesign, procedure manual creation, and project coordination tasks.

Emergency Medical Services Data System Procurement Support (01/2020 to 10/2020)

The EMS Data Procurement Support project included development of a Request for Quotation (RFQ) and post-procurement support for a new emergency medical services data system to allow the State and its many partner agencies to coordinate activities and access key reporting indicators more tightly. Danni supports the EMS Data project with business analysis, including requirements gathering, finalizing the RFQ, assisting with vendor selection, and other project coordination tasks.

Strategic Map Implementation Support and Performance Management/Quality Improvement (PM/QI) Planning Project (02/2020 to 08/2020)

The project includes implementing the State's Strategic Map vision and creating a process to develop and implement a Performance Management and Quality Improvement Plan for the State of West



Virginia. Danni supports this project with business analysis and project coordination tasks including reviewing documents, taking meeting minutes, scheduling, and providing project support.

HIV and Hepatitis Workflow/Business Process Analysis and System Configuration (03/2020 to 06/2020)

The HIV and Hepatitis Process Redesign Project included mapping HIV and hepatitis processes to redesign the disease investigation approach, moving from a paper-based system to leveraging existing capacity in the National Electronic Disease Surveillance System. Danni supported this project with business analysis and project coordination tasks.

Electronic Vital Records System Implementation (01/2020 to 06/2020)

This project supports the implementation of a new electronic vital records system for the State to migrate all historical data and move from an out-of-date, paper-based system to a simple web-based platform for internal and external users. Danni supports the EVRS Implementation project with business analysis and project coordination tasks including vendor facilitation, scheduling, and project support.

New Hampshire Department of Health and Human Services

Women, Infants, and Children (WIC) Shopping Experience Improvement Project (01/2024 to 09/2024)

As the WIC SME, Danni 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 Department of Human Services (DoHS)

Child Welfare Initiatives Project Management Services (01/2020 to 04/2020)

Danni was responsible for project coordination for the Families First implementation support project.

West Virginia Bureau for Medical Services (BMS)

State Plan Review and Support (SPRS) Project (01/2020 to 04/2020)

This project included an end-to-end review of the State Plan, gap analysis, and creation of an up-to-date and compliant copy of the State Plan. Danni provided business analysis including compiling, reviewing, and analyzing sections of the State Plan. Danni also performed project coordination tasks such as scheduling and stakeholder engagement.

1915(c) Children with Serious Emotional Disturbance Waiver Development Project (11/2018 to 04/2020)

This project involved the creation of an 1115c waiver for the State of West Virginia. The waiver was completed and approved in 2020. Danni supported the 1915(c) Waiver project with business analysis,



project coordination, and management tasks including taking meeting minutes, researching, reviewing documents, and developing deliverables.

Enterprise Project Management Office (EPMO) (11/2018 to 04/2020)

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. Danni supported the West Virginia EPMO project with business analysis, project coordination, and management tasks including template creation, scheduling, resource coordination, and research.

Substance Use Disorder (SUD) Waiver Initiative Project (09/2019 to 02/2020)

Providing continued support for the State Medicaid 1115 demonstration waiver focused on addressing the SUD epidemic. Danni supported the SUD Waiver project with business analysis and management tasks including scheduling, taking meeting minutes, researching, and assisting in deliverable creation.

Ghareeb Dental Group (03/2018 to 11/2018)

As the front office coordinator, Danni was responsible for the office's client-facing office activities. This included verifying insurance information, processing payments, and presenting treatment estimates to patients.

I-77 Auto Group (07/2014 to 10/2015)

Danni provided executive assistance to the owner and office manager of I-77, serving as a title clerk. She processed Department of Motor Vehicle paperwork, provided accounting support, and processed vehicle purchases.

International Coal Group (04/2007 to 03/2008)

As the IT services coordinator, Danni provided executive assistance to IT executives, assisted in troubleshooting IT help desk calls, coordinated help desk assignments, and assisted with billing and website design and maintenance.

Charleston Area Alliance (09/2004 to 01/2007)

Danni was a project administrator, responsible for event and trade show planning and coordination, performing research, providing reception, providing administrative functions, assisting with membership services, scheduling meetings, assisting with community development projects, and assisting with riverfront development and historical preservation projects. From September 2004 to February 2005, Danni worked with the Charleston Area Alliance through Manpower Temporary Services.

DANSCO (04/1998 to 07/2003)

Danni started as a receptionist, then moved up to become the office manager and finally the owner of this family real estate, auctioneering, and promotional products business. The business was sold in 2003.



Marcharda Walters-White

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

BA, Graphic Design and Marketing, California State University

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

7 years

Marcharda Walters-White brings 10 years of health and human service experience, working with local and state-level agencies on system implementations, software maintenance and operations, and project oversight. She has worked with proposal teams to develop new business and supported both requirements gathering and testing project phases.

KEY QUALIFICATIONS

7+ years of Medi-Cal (California's Medicaid) experience including roles as an eligibility worker and business analyst for system implementations

Lead business analyst for California Work Opportunity and Responsibility to Kids Information Network (CalWIN) and California Healthcare Eligibility, Enrollment and Retention System (CalHEERS) system enhancements

PROJECT EXPERIENCE

BerryDunn (08/2023 To Present)

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

Marcharda is serving as an analyst on this project supporting the development of a RFP for the procurement of a solution for IA HHS SNAP/FIP programs. Marcharda organized state provided requirements into a Requirements Traceability Matrix (RTM) for inclusion in the RFP, and is currently supporting the development of demonstration scenarios for vendor selection interviews.

Corporation Technology Cost Allocation Project (12/2023 to 02/2024)

Marcharda served as an analyst for the Corporation Technology (CorpTech) Cost Allocation Project. Key activities included supporting the project manager and assisting the project team on cost allocation for shared solutions.

Oregon Department of Early Learning and Care (DELIC)
iQMS for Provider Management Project (01/2024 to present)

Marcharda is serving as an iQMS analyst for the Provider Management Project. Key activities include quality review of deliverables, participating in risk assessment interviews, risk identification, and risk mitigation.



Oklahoma Human Services

OCM Services (01/2024 to present)

Marcharda is supporting the OHS Digital Transformation Office (DTO) Optimization Project by serving as an analyst. Key activities include assisting with the development of the OCM Services charter, analyzing change readiness survey results, supporting change champion network and subcommittees, updating the OCM services status report, preparing presentations, scheduling meetings, logging and tracking issues/decisions, and supporting readiness maturity assessment efforts.

Technology Business Management Division Organization Structure Assessment (08/2023 to 12/2023)

Marcharda served as an analyst and subject matter expert for this project. Key activities include developing web survey and discovery session questions for the information gathering phase of the project, analyzing results, identifying findings, and developing recommendations for the Technology Business Management Division organization structure.

Oregon Health Authority (OHA)

Independent Quality Management Services (iQMS) for Compass Modernization Portfolio Projects (01/2024 to present)

Marcharda is serving as an iQMS analyst for the Measures and Outcomes Tracking System Replacement project as part of the Compass Modernization Portfolio. Key activities include quality review of deliverables, participating in risk assessment interviews, risk identification, risk mitigation, and developing status reports.

Deloitte (10/2021 to 08/2023)

CalSAWS Implementation Supportive Services (11/2022 to 08/2023)

Marcharda supported 18 counties in California as they converted their automated public assistance (Medi-Cal, CalFresh, CalWORKs) eligibility determination system to the California Statewide Automated Welfare System (CalSAWS) in the largest system migration effort in U.S. history. She documented post-implementation trends, issues, and resolutions; prepared reports for the analysis and interpretation of data related to migration; and transformed data sets into quantitative and qualitative charts and graphs.

CalHEERS (10/2021 to 10/2022)

Marcharda assisted in the maintenance of the California Healthcare Eligibility, Enrollment and Retention System (CalHEERS), an online system that streamlines the Affordable Care Act (ACA) eligibility and enrollment process for marketplace healthcare and Medi-Cal. She drafted use cases for CalHEERS portal system enhancements involving eligibility determination, security, and Google Data Analytics; worked with technical leads and stakeholders to construct current state and future state business process flow diagrams; hosted functional design walkthroughs with testing teams and reviewed system test scripts for accuracy; supported System Testing and User Acceptance Testing (UAT) phases, triaged service incident requests and mitigated defects; and queried database to locate cases for testing and to validate interface transactions.

Public Consulting Group (01/2021 to 10/2021)

As an IV&V consultant, Marcharda was responsible for California Work Opportunity and Responsibility to Kids Information Network (CalWIN) Organizational Change Management (OCM) oversight as CalWIN counties prepared for conversion to CalSAWS. She reviewed current state and future state process workflows and documented gaps and provided Project Management support



to the California Government Operations Agency (GovOps) in the operations, development, and distribution of COVID-19 vaccines for the State of California Vaccine Task Force.

DXC Technology/Galnwell Technologies (09/2017 to 01/2021)

Marcharda served as the Lead Business Analyst for CalWIN (Medi-Cal, CalFresh, CalWORKs eligibility determination system) enhancements, integration, and conversion related projects. She participated in JAD sessions and gathered requirements based on interface specifications and state policies; built Project Approach and Cost and Functional Business Requirement deliverables and generated RTM; and reviewed Developer generated Unit Test Plans and endorsed Technical System Documents.

County of San Bernadino, CA (07/2013 to 09/2017)

Employment Services Specialist (11/2015 to 09/2017)

Marcharda monitored and evaluated client progress and attendance in employment training programs. She administered daily OCAT Orientation/Appraisals; interviewed, screened, and counseled clients to increase employability; recruited clients for workforce development certification programs resulting in employment for 50% of participants, and processed child care applications, and generated child care attendance verification forms.

Medi-Cal Eligibility Worker (07/2013 to 11/2015)

Marcharda interviewed applicants and recipients to gather and verify information needed to determine initial and/or ongoing eligibility for Medi-Cal benefits. She interpreted and explained Medi-Cal program regulations, requirements, and procedures, including eligibility factors to new and continuing clients; reviewed applications and declarations for completeness and consistency; participated in error identification, analysis, prevention, and corrective action, and maintained program records in accordance with federal and state regulations.



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

PROJECT EXPERIENCE

BerryDunn (06/2022 to 08/2022; 07/2023 to Present)

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

West Virginia Bureau for Public Health

***Data Modernization and HIV/Hepatitis Elimination Plan Project
Management (09/2023 to 06/2024)***

Skye served as a project coordinator, supporting the Data Modernization project management, 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.

Newborn Screening Processes and Procedures (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.

Accreditation Readiness (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.



North Dakota Department of Human Services

North Dakota Immunization Strategic Plan (04/2024 to present)

Skye served as a project coordinator and analyst in this project to develop a strategic plan for the North Dakota Immunization Unit. She provided support in data collection, producing data visuals, and coordinating data collection efforts.

Workforce Training 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.

Iowa Department of Management (DOM) Division of Information Technology (DoIT)

Cost Allocation (05/2024 to 09/2024)

Skye served the IA DOM Cost Allocation project as a business analyst. She worked on data collection, data presentation, and project coordination to support DOM in developing a new cost allocation and rate-setting methodology.

Wyoming Department of Health Public Health Division

Performance Management / Quality Improvement (PM/QI) and Strategic Plan Support (06/2023 to 05/2024)

Skye supported the PM/QI project by developing a needs assessment to assess PHDs' PM/QI knowledge, analyzing the assessment's findings, and adapting PM/QI 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 (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 Homes for Families (HFF) tracking and communications systems, researched housing, homelessness, and economic development, and presented data to other organizations. She authored/co-authored multiple blog posts and briefs on legislative bills such as the Right to Counsel and the Right of First Refusal Act and prepared meeting agendas and reports for HFF meetings with senators and representatives. She drafted and edited member, advocacy, and event materials, produced/edited policy briefs, graphs, and other information for policy makers and constituents, and assisted with the planning and execution of events and other communication efforts.

County Legislator Joshua Lafazan (06/2017 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 have yet to be addressed.



Mallary Tiffany

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

BS, Operations
Management, Southern
New Hampshire University

Associates, Applied
Science Business
Information Management,
Broome Community
College

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

4 years

Mallary Tiffany is a management professional with experience in customer care, employee development, and account coordination. She has developed a mastery of Total Quality Management Tools. She is passionate about client engagement, data-driven decision-making, and optimizing business processes for operational excellence. Mallary's extensive experience compliments her current work on eligibility and enrollment projects.

KEY QUALIFICATIONS

16 years of experience in customer care
10 years of leadership experience in various projects
7 years of account management, and client engagement

RELEVANT EXPERIENCE

BerryDunn (07/2021 To Present)

Mallary is a Senior Consultant with BerryDunn's Medicaid Practice Group.

West Virginia Department of Human Services (DoHS)

People's Access to Help (PATH) (07/2021 to present)

As Deputy Project Manager for a large-scale eligibility system implementation impacting four state agencies in West Virginia, Mallary oversees a team of 12, managing project coordination, employee development, and analysis. She facilitates daily, weekly, biweekly, and monthly meetings with the Department of Human Services (DoHS) while ensuring the Maintenance & Operations (M&O) Team complies with contractual agreements. Her role includes validating Medicaid, Family Assistance, Child Care, Child Welfare, and Child Support requirements and deliverables, as well as overseeing training, maintenance, and operational activities to maintain system efficiency and compliance.

Oregon Health Authority

CareOregon Change Management Consulting (02/2022 to 08/2022; 12/2023)

Mallary assisted the project lead in HR Strategic Planning with BerryDunn. Mallary's responsibilities included scheduling meetings, note-taking, and facilitation of work sessions. She also was responsible for maintaining the confidential SharePoint site, and developing organizational charts shared between CareOregon and BerryDunn.



Health Promotion Chronic Disease Prevention (HPCDP) Section Culture Change Management with Trauma-Informed Approach Project (05/2022 to 06/2022; 05/2023 to 07/2023)

Mallary assisted the project lead with facilitation of work sessions, scheduling, correspondence, and note-taking.

Baril Corporation (05/2018 to 06/2021)

Mallary worked as an account manager to oversee, design, develop, and manage projects within the organization. She communicates the status of projects and orders with team members and customers to help ensure timelines are met. Additionally, Mallary supports leadership with business goals and objectives in marketing, sales, operations, engineering, and quality.

Charter Communications LLC (09/2012 to 05/2018)

Mallary worked in various positions. As a customer care representative, she provided support and enhanced customer interactions with efficient communication and timely responses. As a resource management specialist, she monitored call volume to provide real time analysis, which included reporting and tracking of any staffing issues, abnormal changes in call volume, and any performance metrics that impacted the business. Mallary worked as a customer care supervisor to conduct hiring interviews, provide regular coaching, and extract data from the data warehouse monitor, track, and assess employee performance. As a customer care analyst, she performed operational testing to ensure process changes and updates met standards. Her final position as a workforce management administrator required that she oversee workforce management scheduling, reporting, and auditing functions. She also managed resources required to meet optimal service level standards and developed extensive reporting illustrating staffing and adherence effectiveness and opportunities at individual, team, and center levels.

Nationwide Credit Inc. (10/2009 to 09/2012)

Mallary worked first as a customer service representative to provide customers with optimal payment options. She then worked as a call center supervisor to handle escalated calls from customer care agents, and then provide tangible feedback to their reporting managers. She also conducted team training, mentoring, and coaching on a consistent basis. As a unit manager, she reported directly to the Director of Operations with a daily analysis of agent performance and provided one on one coaching to subordinates that encouraged performance improvement, and goal development.



Morgan Krieger

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

BS, Journalism, West Virginia University

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

3.5 years

Morgan Krieger is a professional with expertise in Medicaid health system implementation, proficiency in management, and stakeholder involvement. She is competent in doing extensive research and assessment to support evidence-based policy decisions. She is able to work well as a team to establish trust and guarantee project success with a variety of stakeholders and brings over five years' experience applying these skills to project teams.

KEY QUALIFICATIONS

Over three years of experience supporting a single state Medicaid agency with large-scale integrated systems implementation and operations

RELEVANT EXPERIENCE

BerryDunn (10/2021 to Present)

West Virginia Department of Human Services (DoHS)

People's Access to Help (PATH) Maintenance and Operations (M&O) Project Management (05/2023 to Present)

Morgan works as the M&O Manager for the WV PATH project's Bureau for Social Services (BSS). She managed the BSS team post system implementation and continues to manage M&O for an Integrated Eligibility System (IES). Morgan facilitates tasks and establishes and enforces standards of conduct for her team of subject matter experts. She serves as the primary liaison to third-party vendors' implementation teams and coordinates completion of tasks among cross-functional stakeholders. She communicates complex technical and functional concepts diplomatically and effectively with diverse audiences, individuals, and teams, including third-party vendors, project management, and senior leadership within DoHS. Morgan oversees technical expertise and guidance on Medicaid eligibility, enrollment, and coverage strategies to optimize Medicaid health systems within BSS. She forms collaborative project teams and develops plans and strategies to successfully execute processes that support M&O.



PATH DDI Project Management (03/2022 to 05/2023)

Morgan worked as the release coordinator for the WV PATH project's BSS release, overseeing the management of the BSS team through key stages, including design configuration, system and user testing, and the implementation of a new Integrated Eligibility System (IES). She worked closely with cross-functional teams to align the design, implementation, and oversight of initiatives related to Medicaid eligibility, enrollment, and coverage. Morgan facilitated meetings with client stakeholders, provided comprehensive written and verbal status reports on the Child Welfare (CW) project to leadership, and assisted with task coordination based on management directives and project plans. Her responsibilities included monitoring project progress, ensuring adherence to Medicaid regulations, and fostering communication between stakeholders to achieve project goals on schedule and within scope.

Eligibility and Enrollment Implementation Assistance (10/2021 to 03/2022)

Morgan worked as a project coordinator in support of the WV Children's Health Insurance Program (WVCHIP) and PATH projects. Morgan assisted with Medicaid projects, where she helped follow initiatives related to Medicaid eligibility, enrollment, and coverage. She worked with teams to track progress and keep communication clear to meet project goals on time. She assisted in the organization of and preparation for meetings, attended meetings both on behalf of the client and in conjunction with the client and maintained a written record of discussions, and oversaw daily project coordination activities. Morgan developed and documented process flows to enhance project management processes and facilitated meetings to streamline the review process for deliverable materials. Morgan also provided quality control for meeting materials to satisfy the Service Level Agreements (SLAs).

Shuman McCuskey Slicer (11/2019 to 10/2021)

Morgan worked as a marketing coordinator to develop and maintain the firm's internet presence through rebranding, web redevelopment, social media, and biographical enhancements on third-party websites. Her role required meticulous documentation, coordination and scheduling, and she was in charge of all firm public relations, including announcements, advertisements, community involvement, charitable contributions, and sponsorship on behalf of the firm and members. She identified and arranged speaking engagements, seminars, conferences, and continuing legal education classes to help attorneys market their area of expertise and prepared visual and handout materials for these events. Morgan also conducted professional development opportunities for attorneys and developed, managed, and distributed targeted emails, quarterly electronic newsletters, client surveys, and other promotional activities for current, former, and potential clients.

Capitol Market (07/2019 to 11/2019)

Morgan worked as a marketing manager and project coordinator to plan and manage content, graphics, and production of marketing, fundraising, and campaign materials. She wrote and edited compelling communication materials, including internal communications with the board of directors, and external marketing documents, website, and social media, aimed at donors, volunteers, and other external audiences, which entailed heavy documentation. Morgan coordinated the annual signature event that raised \$75,000 and attracted 150 attendees, helped create, expand and/or coordinate approximately 15 events for donors and/or the general public, and managed day to day operations.

I Love Nice People, Inc. (08/2016 to 01/2020)

Morgan was the Co-Founder of a 501(c)3 nonprofit social awareness clothing brand. She managed all documentation / coordination needs and designed a line of ethically made trademarked apparel and accessories. She directed activities of business pertaining to production, pricing, marketing, sales, and distribution of products while also developing and maintaining an internet presence through social media and an e-commerce shop.

Charleston Area Alliance (05/2017 to 01/2018)



Morgan worked as a marketing and communications assistant to write and edit brochures, postcards, profiles, newsletter content, and email campaigns. She managed social networking accounts and collaborated with designers, printers, and other vendors to carry jobs from design to completion. Morgan also assisted with research, analysis, and planning that helped the organization to better communicate with its demographic.

Dorle Simmonds Literary Agency (01/2016 to 05/2016)

Morgan worked as a literary intern that communicated findings of unpublished works and authors with agents. She evaluated writer's work to determine its value for representation and insightfully selected manuscripts from unknown authors with trending concepts, popular topics, and quality writing.



Krista “Rosie” Racer

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

MS, Curriculum &
Instruction, Western
Governors University

BA, Interdisciplinary
Studies, Western
Governors University

Associate in Science,
Trident Technical College

PROPOSED PROJECT ROLE

Project Management
Support Staff

MEDICAID EXPERIENCE

2 years

Krista Racer is a Consultant in BerryDunn’s Medicaid Practice Group. Krista brings positive energy, excellent organization and communication to the group. She excels at developing and maintaining relationships, conducting data analysis, system and user testing, coordination, and management.

KEY QUALIFICATIONS

Experience in Medicaid Health Information Technology (HIT) data-focused project work, including data sharing, database management, data source identification, and data governance

Experience in Application Lifecycle Management (ALM) database to complete interface and batch processing testing.

Experience in solutioning project and resource needs for clients

RELEVANT EXPERIENCE

BerryDunn (04/2022 to Present)

West Virginia (WV) Department of Human Services (DoHS)
People’s Access to Help (PATH) Maintenance and Operations (M&O)
Project Management (09/2023 to Present)

Krista is the Child Welfare Release Coordinator for the project. She keeps in communication with business coordinators and leadership to help ensure the workflow of the project stays in a positive alignment. She provides quality control for internal and external Child Welfare documents and helps to ensure said documents are up to date and meet expectations. She has also acted as the system and user testing lead for the Child Welfare team while creating internal training materials for other releases to utilize. She managed Child Welfare deliverable documents and timelines. Krista works closely with the PATH Change Management team to process and coordinate reviews of current change requests. Krista facilitated meetings with client stakeholders, provided detailed written and verbal status reports on the Child Welfare (CW) project to leadership, and assisted with task coordination based on management directives and project plans.

Eligibility and Enrollment Implementation Assistance (04/2022 to 09/2023)

Krista has also functioned as a project coordinator with a variety of tasks, which include 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).

Kanawha County Public Schools (10/2019 to 04/2022)

Krista worked as a full-time teacher holding training sessions for technology incorporation and team leaders, as well as serving as a mentor teacher for new or beginning teachers. She scheduled and coordinated meeting set-ups, created professional development for Schoology and implemented efficient teaching strategies. In addition, she managed 20-28 students' work, deadlines, and provided additional support as needed. During her time there, Krista implemented school-wide Google Suite services. She also implemented new technological ways for e-learning and in-person learning, facilitated guiding reading and guided math within the classroom, and created individualized goals and learning objectives. She acted as pilot for new curriculum and led trainings. Krista utilized cooperative learning techniques and provided individual instruction to meet the needs of students with diverse learning needs. She maintained documentation for both internal / external classroom needs (parent – teacher conferences and staffing meetings etc.) note-taking for daily / weekly meetings task and detailed oriented.

Suffolk Public Schools (06/2017 to 10/2019)

Krista worked as a full-time teacher in general education and gifted classroom to facilitate effective classroom management techniques, implement efficient teaching strategies, and schedule and coordinate internal and external meetings. She provided a safe and clean educational classroom while creating fun and educational lessons combining whole brain instructions and games. She implemented IXL and Prodigy effectively into the classroom as supplemental resources and facilitated guiding reading and guided math within the classroom. Krista also utilized cooperative learning techniques and provided individual instruction to meet the needs of students with diverse learning needs. This job entailed heavy documentation for both internal / external classroom needs (parent – teacher conferences, staffing meetings etc.) note-taking for daily / weekly meetings task and detailed oriented.



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.

PROJECT EXPERIENCE

BerryDunn (08/2022 to Present)

Alycia works with the BerryDunn team in West Virginia to offer documentation support, including copyediting, proofreading, and formatting services for deliverables. She also develops and delivers presentations on various writing topics such as creating accessible documents; integrating diversity, equity, and inclusion principles into writing; and using PerfectIt to self-edit.

Alycia Minshall Editing Services (03/2014 to present)

Alycia provides editing services to clients across a variety of assignments, including poetry books, master's theses, and doctoral dissertations. She fact-checks, copyedits, and proofreads documents, helping ensure a well-written final product. Past clients include Public Sector Consultants, Michigan Saves, and MedHealth.

Public Sector Consultants (04/2017 to 8/2021)

Senior Editor (06/2020 to 08/2021)

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

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



Editor (04/2017 to 06/2020)

As an editor, Alycia copyedited, proofread, and fact-checked marketing collateral; web copy; press releases; research reports; financial, legal, and technical documents; presentations; social media copy; proposals and requests for proposals; and meeting notes. She helped ensure materials were, accurate, objective, concise, and consistent in voice, brand, and tone across messaging channels.

University of Southern California Graduate School of Social Work (09/2015 to 06/2016)

Alycia served as Learning Support Writing Coach, working collaboratively with graduate students on a variety of writing topics and assignments, including research papers, theses, and dissertations. She taught biweekly seminars on mastering APA style, writing with clarity, conducting research, and organizing writing assignments.

Central Michigan University Writing Center (08/2013 to 06/2014)

Alycia served as the Writing Across the Curriculum Coordinator to develop and schedule more than 100 writing center orientations, writing workshops, and presentations across campus; topics covered included APA style, business writing, and peer-review techniques. She trained writing center staff on delivering workshop and orientation materials, and she maintained a database of record for writing center presentations, including data on number of attendees, date of presentation, and lead presenter.

Central Michigan University (01/2012 to 06/2014)

Alycia served as a graduate assistant to collaborate with students, staff, and faculty on writing assignments to improve clarity and organization. She conducted more than 1,000 writing sessions for undergraduates, graduates, and faculty, and served as lead consultant for ESL students, providing culturally sensitive, tailored sessions for their specific needs.

Alma College Writing Center (08/2008 to 12/2011)

Student Director (08/2010 to 12/2011)

Alycia supervised and managed seven employees, worked closely with the faculty director to properly staff the center, coordinated on-campus presentations, and conducted monthly staff meetings. She created weekly work schedules for staff, scheduled and delivered writing center orientations, and managed monthly payroll submissions.

Writing Center Tutor (08/2008 to 12/2011)

Alycia tutored and collaborated with undergraduate students on class assignments, resumes, and graduate school application essays to improve their writing. She also delivered writing center orientations across campus.



Caitlin Cabral

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BA, Psychology, University of Hartford

Poynter ACES Certificate in Editing

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

5 years

Caitlin Cabral is a Poynter-ACES-certified member of the BerryDunn Editorial/QA team who has demonstrated experience in project management, copyediting, and teaching others business writing skills. She is a self-motivated learner with a strong academic history and the ability to master several roles in the workplace.

PROJECT EXPERIENCE

BerryDunn (09/2021 To Present)

As a member of BerryDunn's Editorial/QA (EQA) team, Caitlin is responsible for proofreading and copyediting meeting notes, memos, reports, and PowerPoint presentations for various projects. This requires helping to ensure that documents conform to BerryDunn's formatting and writing standards as outlined in the BerryDunn Style Guide. Caitlin trains new teammates and creates and presents educational materials to the Consulting Team about various aspects of business writing. She helps to maintain the Style Guide and continuously improve EQA's service offerings.

QualityMetric (08/2020 to 09/2021)

Caitlin worked as a project research assistant and acted as project manager on several concurrent projects, with responsibilities including timeline management, client communications, and supervision of vendors. She provided administrative support to project teams by taking meeting minutes, scheduling calls, processing invoices, and quality-checking materials. She also served as the Deliverable Tracking Manager, which entailed maintaining detailed records and proper storage of deliverables for all ongoing projects. Caitlin was also responsible for copyediting proposals and deliverables for spelling, grammar, fluency, and consistency.

University of Hartford Department of Psychology (01/2019 to 05/2020)

Caitlin worked as a research assistant to aid in running experimental sessions by overseeing the distribution and collection of materials. She facilitated timely data processing by efficiently scoring participant response booklets with colleagues and maintained the integrity of experimental sessions by managing participant entry.



True Colors, Inc. (01/2019 to 05/2019)

Caitlin worked as an intern to supervise vendors at the True Colors Annual Conference, which is the largest consistently run LGBTQ+ youth conference in America. She coordinated check-in and check-out, responded to vendor needs, and directed guests. She also secured donations, identified potential donors, established correspondence, and facilitated donation process. Caitlin redesigned presentation materials to best represent True Colors' current mission and achievements.

University of Hartford Department of Communication (09/2018 to 05/2020)

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



Carole Ann Guay

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BS, Accounting, University
of Southern Maine

PROPOSED PROJECT ROLE

Project Management
Support Staff

RELEVANT EXPERIENCE

9 years

Carole Ann Guay is a senior consultant for BerryDunn's Consulting Services Project Support group. She has over eight years' experience as a project coordinator and technical analyst and workflow developer. She has provided support services such as workflow and dataflow diagrams, document requests, status reports, meeting requests, and data management. She has also worked to help ensure business assessments are compliant with federal regulations and provided documentation support and deliverable assistance on numerous projects.

RELEVANT EXPERIENCE

BerryDunn (10/2014 to Present)

Carole Ann supports BerryDunn's Consulting team with the compilation and reviews of project deliverables, developing high quality visual aids, and workflow documentation.

Puerto Rico Medicaid Program

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

Carole Ann assists with review and updates of deliverables.

Maine Department of Corrections

Offender Management System (OMS) Selection (11/2021 to present)

Carole Ann developed high-level workflow diagrams for the BerryDunn team assessing business processes, crafting cost benefit analyses, developing a Request for Proposal (RFP), and assisting the DOC with its selection of a new OMS.

Ellis County, TX

*Computer-Aided Dispatch/Records Management System (CAD/RMS)
and Jail Management System (JMS) Replacement (06/2021 to present)*

Carole Ann coordinates document request items, status reports, meeting requests, and data management and has been involved in all phases of the project.

Vermont Department of Vermont Health Access

Vermont Health Connect Financial and Programmatic Audit (01/2016 to present)

BerryDunn has performed the State's financial and programmatic audit of its Health Insurance Exchange for FYE 6/16 and is in the process of performing the FYE 6/23 audit. Carole Ann currently serves as the project coordinator on this audit to determine whether the exchange is in material compliance with 45 CFR 155.



Minnesota Health Benefit Exchange (MNsure)

Programmatic Audit (10/2015 to present)

BerryDunn is performing the programmatic audit for the State's health insurance exchange. Carole Ann is the project coordinator for BerryDunn's audit team assessing whether MNsure's program is compliant with all federal requirements.

Monroe County, FL

Clerk and Court Business Process Review (02/2023 to 02/2024)

Carole Ann developed high-level workflow and dataflow diagrams for the BerryDunn team assisting the County Clerk's Office with documenting its business processes for the purposes of identifying and removing barriers to efficiency. At the project's outset, there was a gap in institutional knowledge and a lack of formalized and documented administrative and court processes. BerryDunn helped to bridge that gap by holding cross-divisional meetings with stakeholders to openly discuss process challenges and increase communication.

City of St. Charles, MO

Enterprise Resource Planning (ERP) System Selection Project (09/2023 to 10/2023)

Carole Ann assisted in the analysis of vendor proposals and requirements analysis to assist in vendor selection.

Arizona Department of Agriculture (AZDA)

Licensing System Assessment (12/2022 to 07/2023)

Carole Ann developed high-level workflow diagrams for the BerryDunn team performing an assessment of AZDA's licensing systems. The study concluded with a report which outlined the current state of the licensing system, analyzed the current landscape of agricultural licensing systems and peer states' approaches, provide recommendations for next steps, laid out an implementation roadmap, and provided a task order scope of work for AZDA's IT Modernization Strategic Initiative.

Montana Department of Corrections (MDOC)

OMS Selection and Implementation (01/2023 to 07/2023)

Carole Ann assisted with the development of high-level workflow diagrams for the BerryDunn team providing a review of MDOC's business processes and technology. By the end of the project, the MDOC had a clear vision of how to improve the technology and business processes for a modern offender management solution.

Metropolitan Government of Nashville and Davidson County (Metro), TN

Information Security Program Development (05/2016 to 04/2021)

For Metro's, development of their Information Security Management Program, Carole Ann worked as a project coordinator, assisting in the development of findings reports. In addition, she served as part of the team performing a Payment Card Industry (PCI) Readiness Assessment. These activities included identifying Metro's current state of PCI, identifying where PCI data resides and where it traverses the network.

New Mexico Corrections Department (NMCD)

COTS OMS Replacement (11/2016 to 06/2020)

Carole Ann compiled weekly status reports and participated in interviews as well as survey analysis for the BerryDunn team providing high-level requirements gathering and definition services. BerryDunn also assisted with developing and managing the RFP process through vendor negotiation and facilitated developing detailed OMS requirements with NMCD staff and the selected OMS vendor.

Oregon Enterprise Technology Services (ORTS)

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

Carole Ann developed workflow and dataflow diagrams through on-site meetings as well as conference call sessions for the BerryDunn team providing business analysis services in support of its ITSM



system project. The purpose of the ITSM system project was to provide efficiency and effectiveness enhancements that could lead to the OR ETS providing greater value to its customers.

Colorado Office of the State Auditor
IT Evaluation (09/2017 to 02/2019)

Carole Ann coordinated document request items, status reports, meeting requests, and data management for the BerryDunn team evaluating the State's IT programs, processes, and resources. The BerryDunn team's recommendations served to help the State's IT program align its centralized structure with the General Assembly's goals for daily IT operations, improve the process for evaluating and prioritizing IT projects, increase opportunities to interface with Colorado citizens through existing and new technologies, interface with additional agencies, and understand the level of satisfaction and improved services to customers.

Sacramento Municipal Utility District (SMUD)
Information Security Audit (08/2016 to 12/2017)

Carole Ann provided documentation support and deliverable assistance for SMUD's Information Security Audit.

West Virginia Department of Human Services
Eligibility and Enrollment Independent Security and Privacy Controls Assessment (01/2017 to 07/2017)

Carole Ann served as an analyst for West Virginia Eligibility and Enrollment (E&E) Independent Security and Privacy Assessment project. The independent assessment was completed against the CMS MARS-E v2.0 framework.

Massachusetts State Ethics Commission
CMS Planning and Implementation Services (04/2017 to 06/2017)

Carole Ann provided deliverable support, as well as data gathering and organization for this project. She also participated in on-site fact-finding meetings.

Washington State Auditor's Office (SAO)
Local Government IT Security Audits (11/2014 to 06/2017)

Carole Ann served as a technical analyst assisting in the performance of information security audits for various municipalities throughout the State of Washington, sponsored by the SAO, conducting assessment activities and analysis of current environments. The team assisted in identifying threats, vulnerabilities, and risks, in addition to providing recommendations for remediation.

Webber Energy Fuels (2004 to 2014)

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



Grace Min

DOCUMENTATION SPECIALIST
Berry, Dunn, McNeil & Parker, LLC



Grace Min is an experienced technical writer and editor, bringing experience in copywriting, project management, research, quality assurance, and proofreading.

EDUCATION AND
CERTIFICATIONS

BA, English Literature,
summa cum laude, Oral
Roberts University

PROPOSED PROJECT
ROLE

Project Management
Support Staff

RELATED EXPERIENCE

8 years

PROJECT EXPERIENCE

BerryDunn (11/2024 to present)

Grace supports the consulting services group, working on the Editorial/Quality Assurance team. Grace reviews, formats and copyedits client deliverables, and service level agreements.

Freelance Technical Writer (01/2020 to present)

Grace performs thorough research into subjects requested by clients to write clear and accurate articles, manuals, proposals, standard operating procedures (SOP), and research reports. She collaborates with subject matter experts (SME) and refines information to create clear documentation, cross-checks sources and information to help ensure accuracy, and helps to ensure all content is optimized for SEO purposes.

Contract Copy Editor/Proofreader (06/2017 to present)

Grace reviews and edits a variety of manuscripts including academic articles, books, essays, and informational material. She proofreads and refine material for grammar, syntax, and style; verifies the validity of all content through meticulous fact-checking; and maintains style guide requirements.

Oral Roberts University Graduate School of Theology and Ministry (08/2016 to 05/2017)

As a graduate research assistant, Grace conducted academic research for the dean of the College of Theology and Ministry and professors. She assisted professors with grading and presentations, maintained confidential student records and updated information, and answered student and visitor inquiries.

Oral Roberts University History, Humanities, and Government Department (08/2015 to 05/2016)

Grace assisted professors in grading and attendance, updated computer log of student petitions, and designed and maintained department bulletin boards.



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.



Jonathan Williams, MA, LSSGB

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

BA, English, Bowling Green State University

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

20 years

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

PROJECT EXPERIENCE

BerryDunn (02/2019 to Present)

Jon serves as an editor for BerryDunn's Consulting Team, tasked with proofreading and copyediting client deliverables, meeting notes, memos, and PowerPoint presentations for various government entities.

Freelance Proofreader and Copyeditor (11/2010 to present)

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

Midwest Tape (11/2004 to present)

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

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

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



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

EDUCATION AND CERTIFICATIONS

MA, English, Professional Writing, Southeast Missouri State University

BA, Liberal Arts and Sciences, English Literature and Creative Writing, University of Illinois at Urbana-Champaign

Lean Six Sigma Green Belt
Poynter ACES Certificate in Editing

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

14 years

PROJECT EXPERIENCE

BerryDunn (07/2019 to Present)

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

Jordan supports BerryDunn's consulting groups by providing copyediting, proofreading, formatting, and other quality assurance tasks for various types of documents, including client deliverables and marketing/communications content.

Portland Adult Education (2019)

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

Pearson Smarthinking Writing Lab (2017)

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



Southeast Missouri State University (2015 to 2017)

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

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

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

The Southern Illinoisan (2014 to 2015)

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

Other Teaching Experience (2006 to 2010)

Lanier Technical College

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

Hardin County, IL

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

NOVA Group of Japan

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



KD Dobyne

PROJECT COORDINATOR

Berry, Dunn, McNeil & Parker, LLC



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

PROJECT EXPERIENCE

BerryDunn (09/2023 To Present)

KD serves as a project coordinator for BerryDunn's consulting teams, working with government and quasi-government clients. She assists in the compilation of deliverables, creation of visual aids, and project tracking.

Qualtek Wireless (08/2022 to 09/2023)

As a project coordinator, KD was responsible for responding to client needs to help ensure successful receipt of project deliverables, including spreadsheets, PowerPoints, and closeout packages. She created and delivered purchase orders and also managed materials through Salesforce. She took responsibility for all administrative tasks and managed Verizon's Software Project Management (SPM) Tracker. KD also identified and communicated potential hurdles and areas for improvement within multiple project timelines.

University of Texas at Arlington (08/2018 to 05/2019)

As president of the Asian Student Association, KD managed multiple projects at once to plan and execute a successful year for the organization. She acted as the "face" of the organization by attending presidential roundtables and meeting with the President of the University to track progress and identify any issues. KD led and oversaw the planning and execution of fundraising and events, while staying on schedule and within the organization's budget.

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

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

EDUCATION AND CERTIFICATIONS

BA, Linguistics, University of Texas at Arlington

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

3 years



Megan Hamilton, MA

DOCUMENTATION SPECIALIST
Berry, Dunn, McNeil & Parker, LLC

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

Megan Hamilton is an experienced editor with experience in corporate, research, and academic settings. She has a strong understanding of various citation styles as well as technical, journalistic, and academic editing.

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 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.



Appendix C: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable ID	Deliverable Name	Deliverable Description
01	Commissioner Briefing	A monthly status update delivered to the Commissioner.
02	Monthly Status Report	A monthly status update delivered to the project sponsor(s) and project lead(s).
03	Action Item, Risk, Issue, and Decision Logs	Logs containing action items, risks, issues, and key decisions, respectively. These may be captured during project meetings and project activities via correspondence with stakeholders and at the request of the State. The logs will be maintained on the BerryDunn project SharePoint site.



Appendix D: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

Acronym/Abbreviation	Definition
BerryDunn	Berry, Dunn, McNeil & Parker, LLC
BMS	Bureau for Medical Services
BSS	Bureau of Social Services
CFR	Code of Federal Register
CL	Commodity Line
CMA	Centralized Master Agreement
CMS	Centers for Medicare and Medicaid Services
CW	Child Welfare
DAF	Deliverable Acceptance Form
DDI	Design, Development, and Implementation
DoHS	Department of Human Services
EM	Engagement Manager
GPM	General Project Manager
IAPD	Implementation Advance Planning Document
MITA	Medicaid Information Technology Architecture
MSR	Monthly Status Report
ORT	Operational Readiness Testing
OSA	Office of Share Administration
PATH	People's Access to Help
PMO	Project Management Office
RACI	Responsible, Accountable, Consulted, and Informed
RFP	Request for Proposal
RTM	Requirements Traceability Matrix
SIT	System Integration Testing
SOW	Scope of Work
SS	Project Management Support Staff
State, WV	West Virginia
UAT	User Acceptance Testing
WVOT	West Virginia Office of Technology



Arvin Singh, EdD, MBA, MPH, MS,
FACHE
Cabinet Secretary



Michael Caruso
Cabinet Secretary



Alex J. Mayer
Cabinet Secretary

Date: June 9, 2025

To: Office of Shared Administration
Purchasing Division

From: Kimberly Beckett, Procurement Associate
Management Information Services

KB

Re: CDO MIS25*12-SOW
Berry Dunn CMA HHR21*03

The Office of Management Information Services (OMIS) and Berry Dunn are requesting approval for the above-mentioned delivery order. This delivery order is to provide project management services to support the implementation of the selected communication system. This will also help the state to meet the Medicaid Information Technology Architecture (MITA)-specific goals.

Your approval for this delivery order is greatly appreciated.





May 29, 2025

To Whom It May Concern:

Berry, Dunn, McNeil & Parker, LLC (BerryDunn) submitted a Staffing Plan and Scope of Work (SOW) document to assist the West Virginia Department of Human Services (DoHS) by providing support for the Child Welfare (CW) Communication System Implementation Phase II Project under our master contract (CMA HHR21*03). As stated in the SOW document, the duration of this work is estimated to be 13 months. BerryDunn agrees to a SOW start date effective June 15, 2025.

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

Please let me know if you have any questions or if you would like to discuss the content in this SOW. We are pleased to have the opportunity to provide these important services to the State of West Virginia.

Best Regards,

DocuSigned by:
A handwritten signature in black ink that reads 'Peter Alfrey'.

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

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

300 Capitol Street • Suite 1610 • Charleston, WV 25301 • t. 681.313.8900 • berrydunn.com

Subject: Governor's Office Approval of contracts over \$100,000



Rosen, Bryan D <bryan.d.rosen@wv.gov>
to Wagner, Roberta A, Price, Robert L

Thu, Jan 23,

I spoke with Curtis early today. He relayed the following information for how we will process these through his office.

1. He would like a synopsis of the purchase. I would suggest in most cases we can pull the extended description populate that in the email to him.
2. Please note if there is a specific timeframe in the request.
3. Contracts will be reviewed at the Master Agreement level meaning that he will not be approving DOs.
4. Renewals for contracts over \$100,000 must be approved.

This process is going to be fluid and will likely morph as we move forward but this is the best information that I have today.

Bryan

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Keyword Search

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Simple Search

Search Editor

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

e.g. 123456789, Smith Corp

"BERRY DUNN MCNEIL & PARKER LLC"

x

Entity

Location

Status

- ☒ Active
- ☐ Inactive

Reset 

Entity Information ^



All Entity Information

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West Virginia Secretary of State — Online Data Services

Business and Licensing

Online Data Services Help

Business Organization Detail

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BERRY, DUNN, MCNEIL & PARKER, LLC

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

Organization Information			
Business Purpose	5511 - Management of Companies and Enterprises - Management of Companies and Enterprises - Management of Companies and Enterprises Including Offices of Bank Holding Companies and Other Holding Companies		
Charter County	Kanawha	Control Number	0
Charter State	ME	Excess Acres	
At Will Term	A	Member Managed	MBR
At Will Term Years		Par Value	
Authorized Shares		Young Entrepreneur	Not Specified

Addresses

Type	Address
Designated Office Address	209 WEST WASHINGTON STREET CHARLESTON, WV, 25302
Mailing Address	2211 CONGRESS STREET PORTLAND, ME, 04102 USA
Notice of Process Address	URA SERVICES, INC. 5098 WASHINGTON STREET W. SUITE 407 CHARLESTON, WV, 25313
Principal Office Address	2211 CONGRESS STREET PORTLAND, ME, 04102 USA
Type	Address

Officers

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

DBA

DBA Name	Description	Effective Date	Termination Date
BERRY DUNN	TRADENAME	3/21/2011	
BERRY, DUNN, MCNEIL & PARKER, PLLC	TRADENAME	11/5/2019	

DBA Name	Description	Effective Date	Termination Date
Annual Reports			
Filed For			
2025			
2024			
2023			
2022			
2021			
2020			
2019			
2018			
2017			
2016			
2015			
2014			
2013			
2012			
2011			
2010			
2009			
Date filed			

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

Wednesday, June 11, 2025 — 8:07 AM

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