

**BerryDunn's Technical Proposal to the
West Virginia Veterans Nursing Facility and
West Virginia Veterans Home for
Consulting Services to Assist with the Preparation of a
RFP for Electronic Medical Records**



*West Virginia Department of Veterans Assistance
West Virginia Veterans Nursing Facility*

Submitted in response to RFQ No. VNF 1040

Due Date: June 10, 2014
1:30 p.m. ET

Submitted by:

**Clinton E. Davies, MBA, CCP, FHIMSS, Principal
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06/09/14 09:46:37AM
West Virginia Purchasing Division



June 6, 2014

Mr. Dean Wingerd, Senior Buyer
State of West Virginia Department of Administration
Purchasing Division
2019 Washington Street East
Charleston, WV 25305-0130

Dear Mr. Wingerd:

Berry Dunn McNeil & Parker, LLC (BerryDunn) is pleased to submit this proposal to the West Virginia Purchasing Division in response to Request for Quotations Number VNF1040 for Consulting Services to Assist with the Preparation of a RFP for Electronic Medical Records. We have read the RFQ and addendum, we understand it, and we agree to the terms and conditions therein stated. Our proposal shall remain valid for 90 days from the proposal due date of June 10, 2014. As requested, we have provided our Cost Proposal under separate cover.

Our Understanding of Your Needs

The West Virginia Veterans Nursing Facility (WVNF, the Facility) is seeking a qualified consulting firm to seeking a qualified consulting firm to assist with the development of a RFP, evaluate vendors, and develop an implementation strategy for an Electronic Medical Records (EMR) system. The RFP will be issued on behalf of both WVNF and the West Virginia Veterans Home (WVH, Veterans Home) in Barboursville. WVNF seeks a consultant that meets the following criteria:

- Objective and independent from the hardware and software community
- Experienced working with State Veterans' Homes and Nursing Facilities on EMR projects
- Experienced working in the post-acute setting
- Knowledgeable of the attributes needed in post-acute EMR software
- Has a minimum of 10 years' experience working with healthcare providers and state government

Introduction to BerryDunn

BerryDunn is an IT consulting, management consulting, and accounting firm headquartered in Maine, with an office in Charleston, WV, and serving clients nationally. Since the inception of our consulting group in 1986, we have assisted healthcare providers and government agencies to plan for, select, procure, and implement new systems, including EMR systems such as those being considered by WVNF and WVH.

BerryDunn's dedicated team of healthcare and public sector management and IT consultants has worked with a broad range of post-acute care health systems including long-term care

facilities, nursing homes, skilled facilities, assisted living, and hospice. We have also worked with behavioral health providers, hospitals, health systems, private practices, public health agencies, state health and human service agencies, and state and local government clients to provide clinical, operational, and systems planning services similar to those sought by WVVNF.

We are knowledgeable of a broad range of EMR system vendors and we have assisted many healthcare clients to evaluate needs, develop requirements, develop and issue RFPs, evaluate alternatives and vendors, and select and implement new systems.

BerryDunn is a registered vendor with the State of West Virginia Purchasing Division. Our ID number is B06102201.

Our Work With Healthcare

BerryDunn understands the unique challenges faced by health systems and healthcare providers as they move towards EMR systems. Drawing on our experience with a broad range of healthcare providers, we are able to efficiently evaluate clients' current environments and develop realistic and actionable plans for future systems. Through our experience conducting projects with various health facilities, BerryDunn has established a database of core functional and technical requirements. We have worked with other State Veterans' Homes and post-acute care health systems, so we understand the importance of the integration between clinical documentation, billing, operations, and quality. For example, we understand the significance of making ADL charting straightforward so that it can be complete at or near the point and time of care, or how charting a fall may need to trigger neurochecks to be completed on a resident.

Our Fit for This Project

The project sought by WVVNF is a strong fit for our practice and core services. As an independent consulting firm, we:

- Provide a strong, experienced team for this project that understands and has hands-on experience with the full lifecycle of the EMR selection, procurement, and implementation process, as well as the challenges of EMR adoption and the changes needed to implement new software and workflow practices
- Bring experience working with the Maine Veterans' Homes and Vermont Veterans' Home on similar EMR projects
- Are active in post-acute care associations such as AHCA and NASVH that are focused on topics important to WVVNF
- Are objective and disciplined project managers and analysts
- Have a demonstrated track record together with experienced resources to support the project
- Use a proven project methodology that will provide strong value to WVVNF and WVVH
- Have the experience and knowledge to best complete this project within your timeframe

Mr. Dean Wingerd
June 6, 2014
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- Are independent from the hardware and software community; we do not sell hardware or software, nor do we partner with systems vendors or engage in projects that might impair our independence or objectivity

In Closing

As a Principal of this firm and the leader of our Management and IT Consulting Group and Healthcare practice, I am legally authorized to execute this bid and any documents related thereto on BerryDunn's behalf, including binding BerryDunn in a contractual relationship for the work proposed herein.

Thank you for providing us with the opportunity to submit this proposal. Please contact me at (207) 541-2322 or via e-mail at cdavies@berrydunn.com if you have any questions regarding our proposal. We would enjoy the opportunity to work with WVNF and WVH on this important project and would be pleased to present our proposal to the Evaluation Committee to answer any questions you may have.

Sincerely,



Clinton E. Davies
Principal

Official Address:

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100 Middle Street
Portland, Maine 04101

BerryDunn
300 Capitol Street, Suite 1610
Charleston, West Virginia 25301

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1.0 DETAILED WORK PLAN (IN RESPONSE TO RFQ SECTION 4.1.2.1)

1.1 Statement of Understanding

The West Virginia Veterans Nursing Facility (WVNF) is seeking a qualified consulting firm to assist them in developing a RFP, evaluating vendors, and developing an implementation strategy for an Electronic Medical Records (EMR) system. The RFP will be issued on behalf of both WVNF and the West Virginia Veterans Home (WVH) in Barboursville. WVNF seeks a consultant that meets the following criteria:

- Objective and independent from the hardware and software community
- Experienced working with State Veterans' Homes and Nursing Facilities on EMR projects
- Experienced working in the post-acute setting
- Knowledgeable of the attributes needed in post-acute EMR software
- Has a minimum of 10 years' experience working with healthcare providers and state government

Per Section 6 of the RFQ, the selected consultant will notify WVNF within ten days after contract award and receipt of a purchase order to commence the beginning stages of the contract. As noted in the RFQ General Terms and Conditions (Contract Term), the contract becomes effective upon the selected consultant's receipt of the notice to proceed and must be completed within 90 days.

1.2 Detailed Work Plan

The West Virginia Veterans Nursing Facility and West Virginia Veterans Home are planning to purchase an electronic medical record (EMR) system for the two facilities. They are soliciting proposals from consulting firms to assist them in developing a RFP, evaluating vendors, and developing an implementation strategy. Below we have provided services to support, guide, and advise WVNF and WVH in their process. Our approach anticipates working collaboratively with WVNF and WVH. Collaboration, awareness, and involvement will help build support for the project and are cornerstones of our project management methodology.

The following paragraphs describe our process, the steps we will undertake, and the deliverables we will produce to address the components of your RFQ (addressing services requested in RFQ sections 4.1.1). We are prepared to complete these steps within the 90 day contract period stipulated in the RFQ or a mutually agreed upon modified timeline, if requested by WVNF and WVH. This timeline assumes active participation by WVNF, WVH, and State procurement in the project.

Initial planning – During our initial planning, we will work with the project lead to finalize the our Project Plan and establish a plan for communicating project information among BerryDunn and the WVNF and WVH team members. It will be important that we establish a Core Team and confirm the expectations and participation the team will have in the project. We commonly use a small Core Team of clinicians, finance, staff, administration, and IT that will work with us throughout the project,

help gather information, help make decisions, and provide recommendations. We will work with you to decide who will participate on the Core Team.

We will work with you to determine the communication needs for the various stakeholder groups (e.g., the leadership, the Core Team, end users, etc.) and outline a plan for sharing project-related information accordingly. We will also assemble a list of preliminary information and materials that may already exist for our team to review prior to conducting on-site work. For example, any information related to the demonstrations that you have already viewed. Finally, we will finalize a project timeline that will be used to manage the project, monitor progress, and manage issues as they arise.

Deliverables: List of Advanced Materials, Establishment of Core Team, BerryDunn Project Plan, Schedule for On-site Fact Finding

Conduct on-site interviews and fact-finding – Utilizing the information gained from the review of existing documentation as a starting point, we will conduct on-site interviews, assessment, and fact-finding activities. We will plan to meet with clinical, billing, operational, administrative, and technical staff during our on-site time. We plan to visit both the West Virginia Veterans Nursing Facility and West Virginia Veterans Home as part of our fact-finding.

It is expected that these fact-finding meetings will use a mix of one-on-one interviews, group work sessions, and observation of operations. Our fact-finding process will also include a discussion of the current computer systems and network infrastructure. The purpose of this on-site work will be to understand how the two facilities currently operate and what the needs are for new EMR and associated software and identify any obstacles for the eventual EMR implementation.

Development of Needs Assessment and EMR Strategy – The objective of this step and deliverable is to establish a common understanding of the strengths and challenges in the WVVNF and WVVH current environment and systems. The Needs Assessment will describe the systems and processes currently in place, describe the strengths and challenges in the current environment, identify your goals and objectives for the selection of a new software, consider trade-offs that will need to be addressed in the course of the project, and identify any obstacles that need to be tackled in order for a new EMR to succeed.

One of the key benefits of the needs assessment process is it provides an independent perspective on your EMR needs, identifies early in the effort items that could inhibit progress, begins to establish buy-in, and informs your overall EMR strategy.

We will also develop an implementation strategy, timeline, key points to include in the implementation plan, and project milestones. We will address approaches to project management, project governance, and decision making including resource requirements, risks and issue management, and project communication. We will discuss different implementation, rollout, and go live strategies such as “big bang,” “phased,” and “pilots” to determine the best approach for WVVNF and WVVH. We will also discuss and plan the training needs for your team(s). This will include discussions regarding expectation for training, what strategy may work best (e.g., train-the-training, classroom style, hands on, etc.). Our objective is to develop a plan that is realistic and achievable and continues to promote

buy-in. This plan can be included in the RFP to communicate to vendors your strategy and desired plan.

Deliverable: *Draft EMR Needs Assessment and EMR Strategy(including Project Plan and Project Charter)*

Request for Proposal Development – The information collected during the fact-finding process will provide a starting point for identifying key attributes and functional requirements for the EMR, which will be included in any Request for Proposal to communicate WVNF's and WVH's needs to prospective vendors.

Through our experience conducting projects with similar clients, BerryDunn has established a repository of software requirements. Using these requirements and the information shared with us during our fact-finding, we will develop a draft list of software requirements. We have found that, in using this approach, we are able to describe approximately 75% of the requirements, which allows us to focus our work with the Core Team on identifying additional requirements that are critical or unique to your operations.

We will also develop a draft Request for Proposal (RFP) based on our experience using a proven format that incorporates information on the project, a high-level description of the current environment, your desired approach to implementing a new EMR, the evaluation criteria, and the software requirements. In addition, vendors will be directed to provide information including, but not limited to:

- Company history, qualifications, and financial stability
- Staffing approach and qualifications
- System specifications, including system architecture
- Project approach
- Implementation Plan
- Number of installed sites
- Preferred technical specifications and operating environment
- Training and support programs
- References
- One-time and recurring costs
- Sample contract documents

Deliverables: *Draft Software Requirements and Request for Proposal*

Joint Requirements Planning and EMR Strategy Session – We will facilitate on-site work sessions to review the Needs Assessment and EMR Strategy deliverable, conduct a joint requirements planning (JRP) session, finalize the EMR strategy, and finalize the RFP.

We will meet with the Core Team (and other team members, as appropriate) to walk through the Need Assessment, discuss and validate findings, and answer questions. This assessment is critical, as it supports your overall process of selecting and implementing a new EMR system. In addition, this assessment serves as a communication tool to promote understanding of the need for this project and it can be shared with audiences not working closely with the project (such as the State).

We will also collaborate with the Core Team to review the implementation strategy, timeline, key points to include in the implementation plan, and project milestones. As part of the work session, we will confirm the approach to project management, project governance, and decision making including resource requirements, risks and issue management, and project communication.

We will conduct a JRP session with the Core Team. The purpose of the JRP session is to collaboratively work with the Core Team to review, update, and prioritize the software requirements and review the RFP. This will include prioritizing requirements into “required,” “desired,” and “wish list” categories. By using the draft requirements, we avoid starting the Core Team with a “blank slate” and typically elicit a second wave of software needs definition. It also demonstrates to participants that they were heard when they were interviewed, helping to continue to build buy-in for the new system(s).

Following the sessions, we will update the Needs Assessment and EMR Strategy, Software Requirements, and RFP and provide these to you for final review. We will then work with you and State procurement to issue the RFP and requirements for potential vendors.

Deliverables: Final Needs Assessment and EMR Strategy (including Project Plan and Project Charter), Final RFP, and Final Software Requirements

Software Vendor Evaluation – In addition to assisting you with the development of the RFP for an EMR system, BerryDunn will facilitate an objective vendor evaluation process, with direct involvement of the Core Team and clinical, financial, and administrative personnel who will be working with the selected systems.

Once written vendor proposals are received, BerryDunn will conduct an initial review of vendor proposals and develop a summary that describes each vendor’s proposed level of fit to the requirements, proposed costs, and key observations from our review. We would provide this summary to Core Team as a starting point for conducting their review of vendor proposals. This allows the Core Team to start with summarized information and then drill into the details contained within the proposals as the Core Team evaluates and scores vendor proposals.

We will also develop draft a demonstration script that will structure and guide vendor demonstrations. This structured and consistent approach helps to minimize the amount of “sales presentation” from vendors and makes it easier for Core Team members to compare each system.

We will meet with the Core Team to review the proposal analysis, discuss the next steps in the evaluation process, and review the process that Core Team members will undertake in reviewing and evaluating vendor proposals. We will also review the demonstration script, gain input from the Core Team, and modify the script accordingly.

Following the Core Team's review of proposals, we will facilitate a teleconference to review the evaluations and make decisions. Based on the results of the proposal evaluation, we anticipate up to three vendors will be identified as finalists for further review, including:

- **Vendor Demonstrations** – We will facilitate structured and scripted system demonstrations for the finalist vendors using the demonstration script. Demonstrations provide the Core team members with the opportunity to view system functionality, ask questions of the vendors, and gain hands-on experience with the system in a demonstration lab. We have found the demonstration lab to be an effective mechanism for participants to interact with the software, judge usability, and ask follow up questions of the vendors. At the end of each vendor demonstration, we will facilitate a debriefing with the Core Team and other participants to capture the impressions and evaluation of the vendor while it is fresh in their minds.
- **Reference Checks and Site Visits** – We will develop a telephone reference check guide(s) that will be used by Core Team members in various roles. These guides help guide discussions with peer organizations so that reference checks are conducted in a consistent manner and can inform evaluation decision making. It is important that Core Team members are able to speak with their respective peers (e.g., nursing, IT, leadership, finance, etc.) at organizations using the candidate software systems. We will assist in reference checks, coordinate the effort, and reach out to peer roles at references as needed.

To gain a specific understanding of how a vendor's product is used, it may be appropriate to visit peers in which the vendors have implemented the proposed system(s). This will provide an opportunity to ask questions, observe how the software is being used, understand how it has impacted workflow, assess issues related to use of the software or implementation, and hear any lessons learned that the peer can share. Site visits are most often focused on a preferred and potentially an alternate vendor. We have planned to organize, plan, and participate in one to two site visits.

After these evaluation tasks have been completed, we will facilitate a meeting with the Core Team to discuss the evaluation, perceptions, and opinions of the candidate vendors and rank the finalists to confirm a vendor of preference and alternate vendor.

Deliverables: Demonstration Script, Debriefing Summaries, Reference Check Guide(s), and Site Visit Planning (optional)

Update EMR Strategy – After you have identified a preferred vendor, we will facilitate work sessions with the Core Team to update and finalize the implementation strategy, timeline, key points to include in the implementation plan, and project milestones based on the preferred vendor identified. As part of the work sessions, we will address modifications to project management and decision making including resource requirements, risks and issue management, and project communication based on what is known at that time. We will review different implementation, rollout, and go live strategies such as “big bang”, “phased”, and “pilots” to determine the best approach for WVNf and WVH in light of the preferred EMR vendor’s system and implementation approach.

Deliverables: Updated EMR Strategy (including updated Project Plan and Project Charter)

2.0 FIRM HISTORY AND BACKGROUND (IN RESPONSE TO RFQ SECTIONS 4.1.1.1 AND 4.1.1.2)

2.1 Introduction to BerryDunn

BerryDunn is a Consulting and Certified Public Accounting firm serving clients nationally. We provide a full range of services, including IT consulting, management consulting, audit, accounting, and tax services. BerryDunn is a Limited Liability Company organized in the State of Maine with 34 principals. We have worked in 48 states in the country, as well as in Canada, the Caribbean, and the UK.

	<p>For the last four years, BerryDunn has achieved the INSIDE Public Accounting (IPA) "Top 100 Firm" designation and was named as a "Fastest-Growing" firm in the annual IPA 100 rankings. BerryDunn was also named as the Best CPA Firm for Women by the American Society of Women Accountants (ASWA) and the American Woman's Society of Certified Public Accountants (AWSCPA).</p>
	<p>We believe that these commendations, combined with our continued growth during challenging economic times, speak to the valued services and expertise we bring to our clients as well as the quality and integrity of our firm culture.</p>

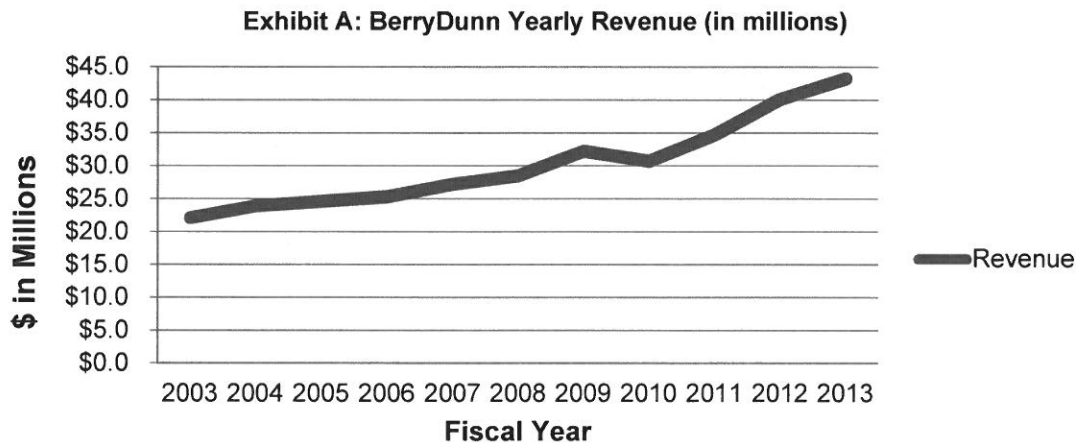
2.2 Company Size and Office Locations

Formed in 1974 with nine professionals, we have experienced sustained growth throughout our 40-year history. We have a sufficient number of staff available to fulfill our commitments, current as well as future. Today, BerryDunn employs approximately 250 personnel in the following seven office locations:

Office Type	Address	Number of Employees
Headquarters	100 Middle Street Portland, Maine 04101	170
Branch Office	36 Pleasant Street Bangor, Maine 04401	30
Branch Office	1000 Elm Street Manchester, New Hampshire 03101	30
Branch Office	300 Capitol Street, Suite 1610 Charleston, West Virginia 25301	11
Satellite Office	60 State Street, Suite 700 Boston, Massachusetts 02109	3
Satellite Office	445 Minnesota Street	4

Office Type	Address	Number of Employees
	St. Paul, Minnesota 5101	
Satellite Office	950 West Bannock Street Boise, Idaho 83702	2

BerryDunn is stable and well-established, which gives our clients confidence when engaging us to conduct strategic, highly visible projects such as WVNF’s initiative. We have consistently added to our team and client base and attribute this growth to the depth of knowledge and experience of our consultants, and our successful project outcomes. Exhibit A demonstrates BerryDunn’s steady growth and our financial stability over the past ten years. During this time, the percentage of the firm’s revenue derived from management and IT consulting services has grown from 10% to more than 35%.

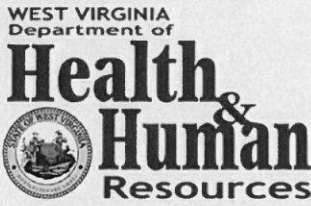


2.3 Our Commitment to West Virginia

BerryDunn has worked with State of West Virginia agencies for more than ten years. To demonstrate our commitment to our West Virginia clients, BerryDunn maintains an office in Charleston, with 11 full-time employees. We provide health IT consulting services to clients in the public and private sectors, including state agencies, providers, and stakeholders in West Virginia. We are currently conducting work for the West Virginia Bureau for Medical Services and the West Virginia Children’s Health Insurance Program, and previously worked with the West Virginia Offices of the Insurance Commissioner and the West Virginia Department of Health and Human Resources.

We are a long-term trusted Medicaid advisor to the West Virginia Bureau for Medical Services and have conducted the following projects with the agency, including RFP development services:

Table 1: BerryDunn's Project Work with the West Virginia Bureau for Medical Services

 <p>WEST VIRGINIA Department of Health & Human Resources BUREAU FOR MEDICAL SERVICES</p>	RFP development, procurement oversight, and implementation project management for MMIS, DW/DSS, and RAC, among others
	Adult Quality Measures grant development and implementation
	MDS 3.0 case-mix analysis and recommendations
	MITA 2.0 and 3.0 SS-A, MITA 3.0 organizational redesign, and MITA maintenance
	Development of rate setting methodology for a subset of West Virginia's behavioral health services
	Development of State Medicaid Health IT Plan and HIT I-APD, HIT project management services
	ICD-10 policy analysis, planning, and implementation support
	Medicaid expansion support and policy analysis
	Health care reform planning and policy analysis
	Development of Project Management Office
Development and implementation of Pilot Community ePrescribing Incentive Program for West Virginia's prescribing community	

2.4 BerryDunn's West Virginia Business License

BerryDunn is a registered vendor with the State of West Virginia Purchasing Division. Our ID number is B06102201.

A copy of BerryDunn's current West Virginia business license appears on the following page.

State of West Virginia



Certificate

I, Natalie E. Tennant, Secretary of State of the State of West Virginia, hereby certify that

BERRY, DUNN, MCNEIL & PARKER, LLC

was duly authorized under the laws of this state to transact business in West Virginia as a foreign limited liability company on January 8, 2008.

The company is filed as an at-will company, for an indefinite period.

I further certify that the company's most recent annual report, as required by West Virginia Code §31B-2-211, has been filed with our office and that a certificate of cancellation has not been filed.

Therefore, I hereby issue this

CERTIFICATE OF AUTHORIZATION



*Given under my hand and the
Great Seal of the State of
West Virginia on this day of
May 7, 2014*

Natalie E. Tennant

Secretary of State

2.5 Our Independence and Objectivity

Central to BerryDunn's identity is the preservation of our independence from the vendor community. Our proposed staff has years of experience providing system planning, selection, and procurement services. However, we do not sell hardware or software, nor do we partner with systems vendors or engage in projects that might impair our independence or objectivity.

This allows us to provide independent services to assist WVNF and WVH in developing a RFP, evaluating vendors, and developing an implementation strategy for an Electronic Medical Record system for WVNF and WVH. BerryDunn will only work in the best interest of WVNF and WVH at all times.

3.0 EXPERIENCE AND QUALIFICATIONS (IN RESPONSE TO RFQ SECTIONS 4.1.1.3, 4.1.1.4, AND 4.1.1.5)

3.1 Our Management and IT Consulting Group

BerryDunn has 27 years of experience working with state governments and healthcare providers. BerryDunn’s Consulting Group was formed in 1986 to provide IT and management consulting services to clients in the public and private sectors, including healthcare providers and government agencies. Our Management and IT Consulting Group will be responsible for providing the proposed services to WVNF. As shown in Table 2, we provide a range of strategic IT and management consulting services to health systems in the public and private sectors.

Table 2: Our Management and IT Consulting Services

Planning, selection, and implementation of EMR and software solutions
Procurement support, RFP development, and contract negotiations for EMR systems
Implementation plans, assistance, and oversight for EMR systems
Project management and quality assurance oversight
EMR Needs assessments
HIPAA Security and Privacy Assessments
Comprehensive IT assessments (operations, technology, staffing, security, governance, etc.)
Strategic planning: business, technology, organizational, staffing, etc.
Optimization of the use and management of technology
Business process and clinical workflow improvement
Governance and IT staffing re-design
Meaningful use consulting
ICD-10 consulting
Evaluating and planning for disaster recovery and business continuity
Penetration Testing and IT Security Projects
Feasibility studies

Helping clients to independently assess, plan for, and procure systems, including EMR, is a core service of our firm. We have a long history of working collaboratively with clients to analyze the EMR environment, business processes, and strategy for public and private healthcare organizations, including government agencies. We are experienced with the full lifecycle of EMR system projects, including evaluating organizational needs, documenting workflows, developing functional and

technical requirements, facilitating the procurement and system selection process, leading contract negotiations, and providing project management and oversight during the implementation phase.

We are accustomed to leading large and complex projects that are highly visible (both within the organization and externally) and require input and collaboration from a broad group of leaders and stakeholders. We offer a proven approach to conducting EMR projects that is comprehensive, objective, and customized to meet each client's unique needs.

Our expertise also includes managing change to implement the cultural and structural adjustments required to support new processes, tools, and strategies. We have designed, implemented and conducted a wide array of training and development programs, including the development of reward, recognition, appraisal and feedback processes for reinforcing new, expected behaviors that come about with organizational change.

3.2 Our Commitment to Healthcare and Government Consulting

Within our Consulting Group, we have a Healthcare Consulting practice dedicated to serving the clinical, operational, technical, and financial needs of healthcare organizations, including those that are private, public, not-for-profit, and funded by federal and state programs. We work with healthcare organizations across the country to help them be effective, efficient, and maximize the value that can be provided by their technology resources. As a firm, we currently serve over 100 healthcare organizations, including:

- Multi-site, multi-program healthcare operations
- State Veterans' Homes
- Long-term care facilities
- Nursing homes
- Continuing care retirement communities
- Independent living facilities
- Department of Corrections health services
- Hospitals
- Health systems
- Group physician practices
- Hospice
- Home health agencies
- Developmental disability providers
- Behavioral health providers

Our team has experience working in the post-acute setting, including knowledge of the attributes needed in post-acute EMR software.

We also have deep experience in Government Consulting providing IT and management consulting services to states, towns, cities, counties, and quasi-governmental agencies across the country, including health and human services agencies. Our projects range in size from \$10,000 to multi-million dollar, multi-year engagements.

In Table 3 below, we have provided a sample of healthcare and government clients for whom we have and/or are currently providing services relevant to those being sought by WVNF.

Table 3: Sample of BerryDunn’s Clients Relevant to WVNF

Client	Project
Healthcare Organizations	
Aroostook Mental Health Center	EMR System Planning
CommUnityCare	IT Assessment, EMR Assessment, and HIPAA Security Assessment
Counseling Services, Inc.	EMR RFP Development, System Evaluation, and Planning
Davis Long-Term Care Group	RFP Development, System Selection, and Technology Planning
Genesis Behavioral Health	IT Assessment and Technology Plan
Houlton Regional Hospital	EMR Needs Assessment, RFP Development, System Planning, Selection, and Implementation
Maine FQHCs	Telecommunications Needs Assessment for EMR
Maine Veterans’ Homes	EMR and Infrastructure Needs Assessment, EMR System Selection and EMR Project Management and Implementation Services
MaineGeneral Health	EMR Scanning and Document Management Business Case Analysis, and Clinical Workflow Assessment
Martin’s Point Health Care	HIPAA Consulting
Mercy Hospital	EMR Needs Assessment, RFP Development, and System Selection
Millinocket Regional Hospital	Strategic Technology Planning
Minnesota Department of Corrections	EMR Business Case Analysis, EMR RFP Development, and EMR Vendor Evaluation
Mount Desert Island Hospital	EMR System Planning, RFP Development, Selection, and Implementation Planning
North Central Health Care	EMR System Assessment, RFP Development, and Selection
REACH, Inc.	Strategic Technology Planning Project, RFP Development, System Selection, and Implementation Advisory Services for New Software
Southern Maine Medical Center	EMR and Practice Management System Assessment and Valuation
Treasure Coast Hospice	EMR RFP Development and System Selection
Vermont State Hospital	Readiness Assessment for EMR System
Vermont Veterans’ Home	EMR RFP Development and Evaluation Project
Woodfords Family Services	EMR RFP Development, System Evaluation, and Planning
Woodlands Senior Living	HIPAA Security Assessment
Government Clients	
West Virginia Bureau for Medical Services	<ul style="list-style-type: none"> • MITA State Self-Assessment (2.0 and 3.0) • MMIS, Data Warehouse/Decision Support, and Pharmacy System Planning, Procurement, and Project Management

Client	Project
	<ul style="list-style-type: none"> • Development of Project Management Office • ACA/Healthcare Reform Consulting Services, Policy Analysis, and Implementation Support • Project Support for Eligibility System Modernization • ICD-10 Impact Assessment, Policy Analysis, and Implementation Oversight
West Virginia Office of the Insurance Commissioner (OIC)	<ul style="list-style-type: none"> • Development of Business and Operational Plan • Policy Analysis • Participation in National Workgroups and Industry Technical Meetings on Behalf of the OIC • Development of Health Benefit Exchange Strategic IT Plan • Evaluation of Interfaces and Integration Needs with Other State Systems, such as Medicaid, Eligibility, and Finance • Portfolio, Program, and Project Management • Grant Writing
Massachusetts Departments of Public Health, Mental Health, and Developmental Services	Business Process Assessment and RFP Development for Next Generation Hospital Information System (including clinical / electronic medical record components)
Missouri Department of Mental Health	EMR Assessment and Development of Long Range Information Strategy Plan
Massachusetts Department of Public Health	Needs Assessment and RFP Development for Ambulance Diversion/Resource Tracking System
Connecticut Department of Public Health	Licensing System Business Needs Assessment
Vermont Department for Children & Families	Children's Integrated Data System Needs Assessment, RFP Development, and Independent Implementation Oversight
Vermont Agency of Human Services	Risk Assessment and Cost/Benefit Analysis for Medicaid Enterprise System

From our extensive work with healthcare organizations and government agencies, we bring a unique understanding of WVNF and WVH as public healthcare organizations. These experiences allow our team to “hit the ground running,” which means WVNF and WVH stakeholders will not spend valuable time bringing our team up to speed.

3.3 Our Industry Involvement

We maintain a current working knowledge of trends in the healthcare and public sector industries, including changes in technology, regulation security, confidentiality, care delivery, and payment/reimbursement. We also participate in topic-specific conferences across the country, which enables us to provide our clients with current information on issues of importance.

We are active participants in relevant industry associations, including:

American Health Care Association (AHCA)

American Health Information Management Association (AHIMA)

Government Finance Officers Association (GFOA)

Healthcare Financial Management Association (HFMA)

Healthcare Information Management Systems Society (HIMSS)

International County/City Managers Association (ICMA)

National Association of Medicaid Directors (NAMD)

National Association of Medicaid Program Integrity (NAMPI)

National Association of State Health Policy (NASHP)

National Association of State Veterans Homes (NASVH)

National Council for Community Behavioral Healthcare (NCCBH)

National Council on Assisted Living (NCAL)

National Rural Health Association (NRHA)

In addition, our proposed project manager, Daniel Vogt, is a Certified Professional in Electronic Health Records (CPEHR), a certified Project Management Professional (PMP), and a technical advisor to the Maine Health Care Association's EMR Workgroup. Dan recently presented at Maine Health Care Association's Leadership Symposium on "Leadership Essentials for Transitioning to an Electronic Health Record (EHR) System." In August, Dan will be presenting a webinar for the New Hampshire Health Care Association on "Planning for and Implementing Electronic Health Records (EHR) in Long-Term Care."

3.4 Our Knowledge of Software System Vendors

Our team has knowledge of and firsthand experience with a range of vendor systems used in healthcare settings. Our broad experience with healthcare system vendors means that we understand the capabilities and limitations of today's systems. Table 4 below provides a representative list of systems that our team has experience with, including those evaluated with clients, and those specifically relevant to the WVNF's project.

Table 4: Vendor System Experience

Software System Vendors	
ADL Data Systems	HealthMEDX
Allscripts	Healthport
American Data	Hi Tech Software
Anasazi Software, Inc.	Lavender & Wyatt Systems, Inc.
Askesis Software, Inc.	LSS
Athenahealth	McKesson
Blackbaud	MDI Achieve
Care Tracker (owned by Cerner)	Meditech
CareVoyant	Microsoft Dynamics GP, NAV, and AX
Cerner	OnShift
CPSI	Netsmart Technologies
Credible Behavioral Health	Netsuite
eClinicalWorks	Nextgen
Eclipsys	PointClickCare
E-MDs	Qualifacts
Epic	Sage (multiple products)
Foothold Technology	Sequest Technologies, Inc.
GE Healthcare	SigmaCare
Greenway	UNI/CARE Systems, Inc.
HCS	VistA

3.5 Our Project Team

Our project team has the skills, experience, and resources to complete this project in a professional and timely manner. Our team is experienced with assisting healthcare clients to develop a RFP, evaluate vendors, and develop an implementation strategy, similar to WVVNF's and WVNH's initiative.

We are proposing a strong, experienced three-person team for this engagement, consisting of Clint Davies, Dan Vogt, and Aimee Tetu. Table 5 provides a description of team member roles and responsibilities. Resumes are provided at the end of this section.

Table 5: Project Team Roles and Responsibilities

Name	Responsibilities and Experience
<p>Clint Davies, MBA, CCP, FHIMSS Project Principal</p>	<p>Clint Davies is a Principal at BerryDunn and the leader of our Management and IT Consulting Group and Healthcare practice. Clint will be the Project Principal on this engagement. In this role, he will:</p> <ul style="list-style-type: none"> • Lead and be actively engaged in all phases of our work • Maintain overall responsibility for the quality of BerryDunn's services and deliverables • Ensure the full commitment of our firm and ensure that appropriate resources are allocated to the engagement to successfully complete this project on time • Provide oversight of our team • Provide EMR and RFP subject matter expertise • Participate in select on-site work and in key meetings with project leadership <p>For over 25 years, Clint has been providing objective IT and management consulting services to clients in the healthcare industry, among others. His experience spans long-term care facilities, State Veterans' Homes, hospitals, health systems, federally qualified health centers (FQHCs), private practices, specialty practices, and behavioral/mental health facilities, among others. He has extensive experience assessing client readiness for the implementation of new systems, developing software and systems requirements, developing RFPs, evaluating vendors, negotiating contracts, leading change efforts, and providing independent oversight of implementations. Clint has advised clients in the evaluation, acquisition, and implementation of more than 100 significant information systems projects.</p> <p>Clint is a longtime member and Fellow in the Healthcare Information and Management Systems Society (HIMSS) and a Past President of the New England Chapter. Together with the Maine Veterans' Home, Clint recently presented at the 2014 HIMSS conference on the topic of <i>"Design Teams, Engage Physicians, and Successfully Implement Post-Acute EHR."</i></p>
<p>Dan Vogt, BS, CPEHR, PMP Project Manager</p>	<p>Dan Vogt is a Manager in BerryDunn's Management and IT Consulting Group and focuses on our Healthcare practice. As Project Manager on this engagement, Dan will:</p> <ul style="list-style-type: none"> • Serve as the primary point of contact with WVNf and WVVH • Develop and maintain the Project Work Plan and Schedule • Lead the day-to-day activities for this project • Participate in and/or lead team meetings with WVNf and WVVH • Lead the on-site work • Lead the creation of deliverables <p>Dan has significant experience assisting healthcare clients with planning for, procuring, selecting, and implementing new systems, specifically EMR systems. He</p>

Name	Responsibilities and Experience
	<p>has led recent EMR projects with the Maine Veterans' Homes, Vermont Veterans' Home, and Minnesota Department of Corrections, among others. Prior to joining BerryDunn in 2006, Dan was a Senior Implementation Specialist with Meditech, a vendor of hospital information systems.</p> <p>Dan is a Certified Professional in Electronic Health Records (CPEHR) and specializes in identifying ways to strengthen utilization and management of technology. Dan is a certified Project Management Professional (PMP).</p>
Aimee Tetu Consultant	<p>Aimee is a Consultant in our Management and IT Consulting Group. She provides strategic technology planning, EMR needs assessments, system selection, and implementation of information systems. As Consultant on this engagement, Aimee will:</p> <ul style="list-style-type: none"> • Work in collaboration with Dan and Clint to conduct fact-finding meetings • Analyze findings • Assist with the development of project deliverables <p>Aimee recently worked with the Vermont Veterans' Home, assisting with the planning for an Electronic Medical Record system, including the development of the RFP and software requirements.</p> <p>Aimee has experience making recommendations based on information gathered through research and fact-finding activities, developing requirements, and interpreting regulation. She recently worked as part of BerryDunn's team to develop a Meaningful Use Strategy for the Spectrum Medical Group and has been working with Frisbie Memorial Hospital on their ICD-10 implementation project.</p> <p>Aimee is a Certified Information Systems Auditor (CISA), certification pending.</p>
Project Support BerryDunn Consultants	<p>In addition to the team members detailed above, BerryDunn may draw from its team of consultants, as needed, to review and analyze documentation, conduct research, and provide assistance with fact-finding meetings and the creation of deliverables.</p>

In addition to our core team members above, we will draw on other members of our consulting group as warranted to provide additional assistance and subject matter expertise to this project. Our consulting group is comprised of approximately 50 team members, with a broad range of technical and professional certifications, including:

CAPM - Certified Associate of Project Management

CCNA - Cisco Certified Network Associate

CCP - Certified Computing Professional

CEH - Certified Ethical Hacker

CFE - Certified Fraud Examiner

CGEIT - Certified in the Governance of Enterprise IT

CISA - Certified Information System Auditor

CISM - Certified Information Security Manager

CISSP - Certified Information Systems Security Professional

CMA - Certified Management Accountant

CNE - Certified Novell Engineer

CPEHR - Certified Professional in Electronic Health Records

CPP - Certified Process Professional

MCDST - Microsoft Certified Desktop Support Technician

MCP - Microsoft Certified Professional

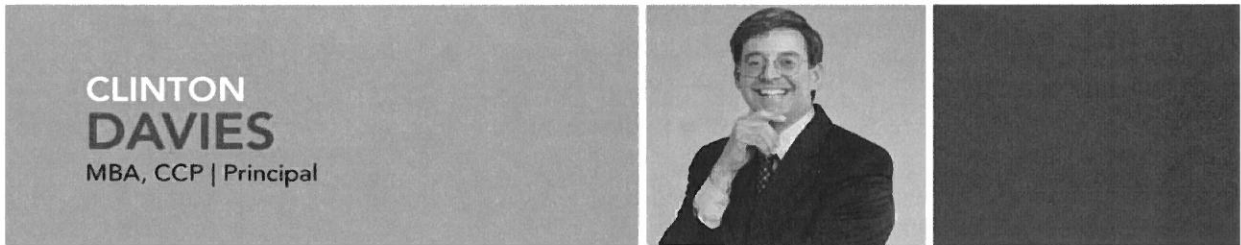
MCSA+M - Microsoft Certified Systems Administrator / with messaging specialty

MCSE+M - Microsoft Certified Systems Engineer / with messaging specialty

PMP - Project Management Professional

VCP5-DCV - VMware Certified Professional 5 - Data Center Virtualization

On the following pages, we have provided resumes for our proposed project team members.



Clint Davies is a Principal at BerryDunn and leads our Management and IT Consulting Group and Healthcare practice. He has over 25 years of experience conducting technology assessments and planning projects, system evaluations, system implementations, and operational process and planning engagements.

Relevant Experience

Leading system planning, selection, and implementation projects. Clint has assisted in the evaluation, acquisition, and implementation of more than 100 significant information systems, many of which were for healthcare facilities. These projects have entailed evaluating system needs, determining requirements, developing RFPs, evaluating vendors, negotiating contracts, and providing independent oversight of multi-year system implementations.

Evaluating healthcare IT needs. Much of Clint's work has entailed working with health systems, hospitals, and specialty physician practices to plan for and select new systems. He is currently the principal for BerryDunn's work with Maine Veterans' Homes on their EMR selection and implementation project. He also led our work with the Vermont Veterans' Home to provide Project Manager Services for an EMR Project.

He also led an EMR and billing system assessment and vendor selection project for North Central Health Care, a Wisconsin public agency providing outpatient, day hospital, community support, and inpatient mental and developmental health services. In addition, he was the Principal for the development of an EMR RFP and Vendor Evaluation Project for the Minnesota Department of Corrections Health Services.

Evaluating processes, systems, and operations. Clint has extensive experience working with healthcare providers to evaluate processes, systems, and operations and make recommendations to improve operational performance and strategically plan for future infrastructure and resource needs. A central part of these projects involves looking at the institution's IT resources, determining staffing and organizational needs in order to achieve the strategic vision, and identifying opportunities to achieve greater efficiency and effectiveness through the use of technology.

Education, Certifications, and Industry Involvement

Clint is a longtime member and Fellow in the Healthcare Information and Management Systems Society (HIMSS) and a Past President of the New England Chapter. He earned his MBA from the University of Maine and is a Certified Computer Professional (CCP). He serves on the Advisory Board for the University of Maine, College of Business, Public Policy and Health. Clint has authored numerous articles on healthcare management and technology topics, is a regular speaker at industry conferences, and has organized conferences on the integration of health IT.

DANIEL**VOGT**

CPEHR, PMP | Manager



Dan Vogt is a Manager in BerryDunn's Management and Information Technology Consulting Group. Dan conducts evaluations of clients' healthcare technology and assists in planning, needs assessments, system selection, and implementation oversight for various systems. Prior to joining BerryDunn in 2006, Dan worked in the healthcare industry as a senior implementation specialist with Meditech, a vendor of integrated software applications for healthcare facilities.

Relevant Experience

EMR system selection, planning, and implementation. Dan has guided several clients in planning for, selecting, and implementing new EMR systems. He led an EMR assessment, selection, and implementation project for the Maine Veterans' Homes. He also led our work with the Vermont Veterans' Home to provide Project Manager Services for an EMR Project. A central part of these projects has involved collaborating with physicians, nurses, CNAs, IT staff, administrators, and other stakeholders to build understanding for the organization's needs, gaining buy-in and support for the future system, and beginning the process of planning for change.

Dan also led the EMR assessment and planning project for the Minnesota Department of Corrections Health System. This included evaluating paper workflow and planning for the changes required to get to a fully automated clinical system.

Project management and implementation oversight. Dan provided project management services for Mount Desert Island Hospital and Houlton Regional Hospital's EMR system implementations for their physician practices. In addition, he conducted an independent assessment of the Vermont State Hospital's preferred EMR solution, on behalf of the Vermont CIO's Office, to identify potential risks and issues for the Hospital's consideration prior to contract signing. As part of the assessment, Dan provided recommendations for ways the Hospital could minimize risk and increase the likelihood of a successful implementation.

Education, Certifications, and Industry Involvement

Dan earned his B.S. in Business and Economics from Lehigh University. Dan is a Certified Professional in Electronic Health Records (CPEHR) and a Project Management Professional (PMP). Dan also completed the certificate program "Leadership Strategies for Information Technology in Healthcare" at the Harvard University School of Public Health. He is an active member of AHCA/NCAL, NASVH, HIMSS, the New England HIMSS Chapter, HFMA, and AHIMA.

Dan is a technical advisor to the Maine Health Care Association's EMR Workgroup, and recently spoke at Maine Health Care Association's Leadership Symposium on "Leadership Essentials for Transitioning to an Electronic Health Record (EHR) System." He will also be presenting a webinar for the New Hampshire Health Care Association in August on "Planning for and Implementing Electronic Health Records (EHR) in Long-Term Care."

AIMEE

TETU

BS, CISA | Consultant



Aimee Tetu is a Consultant in our Management and IT Consulting Group. She specializes in assisting clients with technology planning, application and organizational needs assessments, system selection, and the implementation of information systems. She also provides information assurance, security, and privacy services.

Relevant Experience

EMR Consulting. Aimee worked as a part of the BerryDunn team with Vermont Veterans' Home project for an EMR system. Aimee's role involved conducting fact-finding with physicians, nurses, MDS coordinators, CNAs, medical records, billing, social services, admissions, and maintenance to understand their need for a system. Aimee worked with our team to develop an RFP and software requirements for clinical, operational, and financial software. Aimee analyzed vendor proposals, established level of fit, and assisted in the facilitation of demonstrations.

ICD-10 Consulting. Aimee worked as part of BerryDunn's team with Frisbie Memorial Hospital to prepare for and implement ICD-10 at the hospital and health system. Aimee's role involved conducting vendor readiness assessments, assisting with staff readiness checking, developing chart review and clinical documentation review templates, and providing project management services. Aimee worked with finance, clinical, billing, and coding team members from the hospital.

Meaningful Use Consulting. Aimee worked as part of the BerryDunn team in a Meaningful Use (MU) Strategy project for a large medical practice of specialists. She has conducted specific research pertaining to the Stages of MU, reviewed the regulatory requirements, interpreted Centers for Medicare & Medicaid Services (CMS) guidance, conducted interviews with specialist associations, and drafted a comment letter to CMS based on the Stage 2 Notice for Proposed Rulemaking (NPRM) on behalf of our client.

Information assurance, security, and privacy services. Aimee conducts information security assessments for clients who require high levels of information security, privacy, and availability. These projects involve participating in on-site work, performing test procedures, observing controls, and preparing documentation for inclusion in our reports of findings and recommendations.

Education, Certifications, and Industry Involvement

B.S. Accounting and Liberal Studies, Bentley University


Aimee is a Certified Systems Information Auditor (CISA), certification pending.


4.0 REFERENCES (IN RESPONSE TO RFQ SECTION 4.1.1.6)

On the following pages, we have provided reference information for three client projects that involved work similar to that which WVNf and WVH are undertaking:


1. **Maine Veterans' Homes:** EMR and Infrastructure Needs Assessment, EMR System Selection and EMR Project Management and Implementation Services
2. **Vermont Veterans' Home:** Project Manager Services for EMR Evaluation Project
3. **Minnesota Department of Corrections:** EMR Business Case Analysis, EMR RFP Development, and EMR Vendor Evaluation

We have selected these projects to demonstrate the depth and breadth of our team as it relates to providing the services requested by WVNf and WVH. We encourage you to contact our references to inquire about our performance and our clients' satisfaction with the services we have provided.

BerryDunn Reference: Maine Veterans' Homes	
Organization:	 <p>MAINE VETERANS' HOMES <i>caring for those who served</i></p>
Contact Information:	<p>Ms. Deb Fournier COO</p> <p>Telephone: (207) 622-0075 Email: dfournier@maineveteranshomes.org</p>
Brief description of project:	<p>EMR and Infrastructure Needs Assessment, EMR System Selection and EMR Project Management and Implementation Services</p> <p>Maine Veterans' Homes (MVH) is a 640-bed, six facility, not-for-profit health system providing long-term care, skilled nursing, residential care, and rehabilitation services for veterans and spouses in the State of Maine. BerryDunn conducted a project with MVH over a two-and-a-half-year period that contained five major components: 1) an IT assessment of software, hardware, infrastructure, and IT staffing; 2) a system selection for a new EMR, billing, and financial software; 3) project management for the implementation of new software, hardware, and infrastructure; 4) an evaluation of hosted vs. internally supported IT infrastructure; and 5) a HIPAA security gap assessment.</p> <p>During the assessment work, we focused visits to MVH's six homes and central office. We spoke with key team members, reviewed current processes, observed workflows, and identified the areas of greatest deficiency. During the assessment, we reviewed technical documentation, staffing, the current hardware and software infrastructure, and current operating practices around use of existing systems. This information gathering, coupled with our experience with similar clients, and best practices served as the basis of our assessment report and the system requirements we developed during the selection phase.</p> <p>Our work included evaluating self-hosted vs. cloud solutions, planning for infrastructure upgrades, designing technology for disaster recovery, and assisting in failover testing. The selection components of the project also included the development of software and technical system requirements, a Request for Proposal (RFP), and facilitation of vendor demonstrations, references checks, site visits, and negotiations. During this phase, we worked closely with MVH's Selection Team and key clinical and administrative personnel to collaboratively define functional and technical requirements specific to MVH's needs.</p> <p>The implementation component involves providing project management, oversight, consistent communication, and monthly status reports throughout the implementation process. We are providing an independent and objective perspective of the implementation to proactively manage risks and issues, and provided resources to assist in the implementation.</p> <p>In addition, we conducted a HIPAA Security Assessment with MVH in parallel with the other work underway.</p>

BerryDunn Reference: Vermont Veterans' Home	
Organization:	 VERMONT Vermont Veteran's Home
Contact Information:	Ms. Melissa Jackson, BSW, LNHA Administrator Telephone: (802) 447-6533
Brief description of project:	<p>Project Manager Services for EMR Project</p> <p>Faced with the need to select and implement an EMR, Vermont Veterans' Home (VVH) engaged BerryDunn to act as the Project Manager and lead and oversee the development of bid criteria, the evaluation of the bid documents, and vendor evaluation. The scope of project management services provided by BerryDunn included:</p> <ul style="list-style-type: none"> • Establishing a timeline and maintaining it through the completion of the EMR project • Maintaining the Veterans Affairs (VA) grant requirements established by the VA form Checklist 10-0388-14 • Assessing VVH's current computer systems network infrastructure, and EMR needs • Maintaining responsibility for preparing RFPs, bid documents, and software requirements for each aspect of the project • Assisting in developing bid criteria for the EMR using levels from "must have" to "good to have" • Facilitating demonstrations • Leading the VVH Core Team through the vendor comparison process <p>VVH reached decisions on a preferred EMR strategy but is awaiting progressing further with their EMR project until they can secure funding need to implement the system.</p>

BerryDunn Reference: Minnesota Department of Corrections

Organization:	
Contact Information:	Ms. Nanette Larson Health Services Director Telephone: (651) 361-7280 Email: nanette.larson@state.mn.us
Brief description of project:	<p>EMR Business Case Analysis, EMR RFP Development, and EMR Vendor Evaluation</p> <p>The Minnesota Department of Corrections' (DOC) Health Services, which encompasses medical services and behavioral health services, has a constitutional and statutory obligation to provide healthcare, including psychological services, to the offender population. In 2011, BerryDunn conducted an Electronic Medical Records (EMR) Business Case Analysis for the DOC to evaluate needs and build a business case for an EMR system across its 10 correctional facilities statewide. As a result of BerryDunn's analysis, the DOC presented the business case to the State Legislature to request funding to select and purchase a new system.</p> <p>Through a separate procurement, the DOC hired BerryDunn to provide technical assistance to define functional and business needs for a new EMR system, develop a RFP, facilitate the vendor selection process, and provide project management services. We are currently assisting DOC in evaluating vendor options and planning demonstrations of EMR software.</p>

5.0 INSURANCE REQUIREMENTS (IN RESPONSE TO RFQ SECTION 4.1.2)

On the following page, we have provided BerryDunn's proof of insurance for:

- Workers' Compensation Insurance (Please see Insurance Letter "D" on the following page)
- Commercial General Liability Insurance

6.0 ADDITIONAL REQUIREMENTS

- In response to Section 9 of the RFQ (Facilities Access), we do not anticipate that our project team will require access cards and/or keys while on-site at WVVNF or WVVH.
- In response to Section 11.1 of the RFQ, Clint Davies will be the Contract Manager for this project. He will oversee BerryDunn's responsibilities under this contract and is available during normal business hours to address customer service or other issues that arise. Clint's contact information is:

Contract Manager: Clinton E. Davies

Telephone Number: (207) 541-2322

Fax Number: (207) 774-2375

Email Address: cdavies@berrydunn.com



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

Solicitation

NUMBER
VNF1040

PAGE
1

ADDRESS CORRESPONDENCE TO ATTENTION OF:
DEAN WINGERD
304-558-0468

RFQ COPY

TYPE NAME / ADDRESS

VENDOR

Berry Dunn
 100 Middle Street 4th Floor East Tower
 Portland, ME 04101

SHIP TO

DIVISION OF VETERANS AFFAIRS
 VETERANS NURSING FACILITY
 ONE FREEDOMS WAY
 CLARKSBURG, WV
 26301 304-627-2415

DATE PRINTED
05/21/2014

BID OPENING DATE: 06/10/2014

BID OPENING TIME 1:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	LS		961-20	\$83,894	\$83,894
CONSULTING SERVICES TO PREPARE AN RFP THE WEST VIRGINIA PURCHASING DIVISION FOR THE AGENCY, WV VETERANS NURSING FACILITY, IS SOLICITING BIDS TO PROVIDE CONSULTING SERVICES TO ASSIST WITH THE PREPARATION OF A REQUEST FOR PROPOSAL TO PROVIDE ELECTRONIC MEDICAL RECORDS FOR BOTH THE VETERANS NURSING FACILITY IN CLARKSBURG AND THE WV VETERANS HOME IN BARBOURSVILLE, WV, PER THE ATTACHED SPECIFICATIONS. ATTACHMENTS INCLUDE: 1. INSTRUCTIONS TO VENDORS SUBMITTING BIDS. 2. GENERAL TERMS AND CONDITIONS. 3. VNF1040 SPECIFICATIONS. 4. CERTIFICATION AND SIGNATURE PAGE. 5. PURCHASING AFFIDAVIT. 6. VENDOR PREFERENCE FORM.						

SIGNATURE	TELEPHONE 207-541-2322	DATE June 10, 2014
TITLE Principal	FEIN 01-0523282	ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO SOLICITATION, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



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

VNF1040

1

ADDRESS CORRESPONDENCE TO ATTENTION OF:
DEAN WINGERD
304-558-0468

RFQ COPY

TYPE NAME/ADDRESS HERE

Berry Dunn McNeil & Parker, LLC
100 Middle Street
Portland, Maine 04101

DIVISION OF VETERANS AFFAIRS
VETERANS NURSING FACILITY

ONE FREEDOMS WAY
CLARKSBURG, WV
26301 304-627-2415

VENDOR

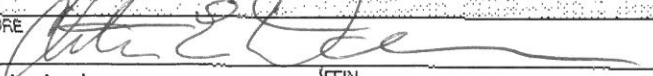
SHIP TO

DATE PRINTED
06/04/2014

BID OPENING DATE: 06/10/2014

BID OPENING TIME 1:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
				ADDENDUM NO. 1		
				ADDENDUM IS ISSUED:		
				1. TO PROVIDE RESPONSES TO VENDORS' QUESTIONS REGARDING THE ABOVE SOLICITATION. QUESTION AND ANSWER PAGES ARE ATTACHED.		
				2. TO PROVIDE ADDENDUM ACKNOWLEDGMENT. THIS DOCUMENT SHOULD BE SIGNED AND RETURNED WITH YOUR BID. FAILURE TO SIGN AND RETURN MAY RESULT IN THE DISQUALIFICATION OF YOUR BID.		
				***** END OF ADDENDUM NO. 1 *****		

SIGNATURE  TELEPHONE 207-541-2322 DATE June 10, 2014
 TITLE Principal FEIN 01-0523282 ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO SOLICITATION, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

ADDENDUM ACKNOWLEDGEMENT FORM

SOLICITATION NO.: _____

VNF1040

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

- | | |
|----------------------------------------------------|------------------------------------------|
| <input checked="" type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6 |
| <input type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7 |
| <input type="checkbox"/> Addendum No. 3 | <input type="checkbox"/> Addendum No. 8 |
| <input type="checkbox"/> Addendum No. 4 | <input type="checkbox"/> Addendum No. 9 |
| <input type="checkbox"/> Addendum No. 5 | <input type="checkbox"/> Addendum No. 10 |

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Berry Dunn McNeil & Parker, LLC (dba BerryDunn)
Company


Authorized Signature

June 10, 2014

Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.

State of West Virginia VENDOR PREFERENCE CERTIFICATE

Certification and application* is hereby made for Preference in accordance with *West Virginia Code*, §5A-3-37. (Does not apply to construction contracts). *West Virginia Code*, §5A-3-37, provides an opportunity for qualifying vendors to request (at the time of bid) preference for their residency status. Such preference is an evaluation method only and will be applied only to the cost bid in accordance with the *West Virginia Code*. This certificate for application is to be used to request such preference. The Purchasing Division will make the determination of the Vendor Preference, if applicable.

1. Application is made for 2.5% vendor preference for the reason checked:

- Bidder is an individual resident vendor and has resided continuously in West Virginia for four (4) years immediately preceding the date of this certification; **or,**
- Bidder is a partnership, association or corporation resident vendor and has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; or 80% of the ownership interest of Bidder is held by another individual, partnership, association or corporation resident vendor who has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; **or,**
- Bidder is a nonresident vendor which has an affiliate or subsidiary which employs a minimum of one hundred state residents and which has maintained its headquarters or principal place of business within West Virginia continuously for the four (4) years immediately preceding the date of this certification; **or,**

2. Application is made for 2.5% vendor preference for the reason checked:

- Bidder is a resident vendor who certifies that, during the life of the contract, on average at least 75% of the employees working on the project being bid are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; **or,**

3. Application is made for 2.5% vendor preference for the reason checked:

- Bidder is a nonresident vendor employing a minimum of one hundred state residents or is a nonresident vendor with an affiliate or subsidiary which maintains its headquarters or principal place of business within West Virginia employing a minimum of one hundred state residents who certifies that, during the life of the contract, on average at least 75% of the employees or Bidder's affiliate's or subsidiary's employees are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; **or,**

4. Application is made for 5% vendor preference for the reason checked:

- Bidder meets either the requirement of both subdivisions (1) and (2) or subdivision (1) and (3) as stated above; **or,**

5. Application is made for 3.5% vendor preference who is a veteran for the reason checked:

- Bidder is an individual resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard and has resided in West Virginia continuously for the four years immediately preceding the date on which the bid is submitted; **or,**

6. Application is made for 3.5% vendor preference who is a veteran for the reason checked:

- Bidder is a resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard, if, for purposes of producing or distributing the commodities or completing the project which is the subject of the vendor's bid and continuously over the entire term of the project, on average at least seventy-five percent of the vendor's employees are residents of West Virginia who have resided in the state continuously for the two immediately preceding years.

7. Application is made for preference as a non-resident small, women- and minority-owned business, in accordance with *West Virginia Code* §5A-3-59 and *West Virginia Code of State Rules*.

- Bidder has been or expects to be approved prior to contract award by the Purchasing Division as a certified small, women- and minority-owned business.

Bidder understands if the Secretary of Revenue determines that a Bidder receiving preference has failed to continue to meet the requirements for such preference, the Secretary may order the Director of Purchasing to: (a) reject the bid; or (b) assess a penalty against such Bidder in an amount not to exceed 5% of the bid amount and that such penalty will be paid to the contracting agency or deducted from any unpaid balance on the contract or purchase order.

By submission of this certificate, Bidder agrees to disclose any reasonably requested information to the Purchasing Division and authorizes the Department of Revenue to disclose to the Director of Purchasing appropriate information verifying that Bidder has paid the required business taxes, provided that such information does not contain the amounts of taxes paid nor any other information deemed by the Tax Commissioner to be confidential.

Under penalty of law for false swearing (*West Virginia Code*, §61-5-3), Bidder hereby certifies that this certificate is true and accurate in all respects; and that if a contract is issued to Bidder and if anything contained within this certificate changes during the term of the contract, Bidder will notify the Purchasing Division in writing immediately.

Bidder: Berry Dunn McNeil & Parker, LLC (dba BerryDunn)

Signed: 

Date: June 10, 2014

Title: Principal

*None of these statements are applicable to BerryDunn.

RFQ No. VNF1040STATE OF WEST VIRGINIA
Purchasing Division**PURCHASING AFFIDAVIT**

MANDATE: Under W. Va. Code §5A-3-10a, no contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and: (1) the debt owed is an amount greater than one thousand dollars in the aggregate; or (2) the debtor is in employer default.

EXCEPTION: The prohibition listed above does not apply where a vendor has contested any tax administered pursuant to chapter eleven of the W. Va. Code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

DEFINITIONS:

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Employer default" means having an outstanding balance or liability to the old fund or to the uninsured employers' fund or being in policy default, as defined in W. Va. Code § 23-2c-2, failure to maintain mandatory workers' compensation coverage, or failure to fully meet its obligations as a workers' compensation self-insured employer. An employer is not in employer default if it has entered into a repayment agreement with the Insurance Commissioner and remains in compliance with the obligations under the repayment agreement.

"Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

AFFIRMATION: By signing this form, the vendor's authorized signer affirms and acknowledges under penalty of law for false swearing (*W. Va. Code §61-5-3*) that neither vendor nor any related party owe a debt as defined above and that neither vendor nor any related party are in employer default as defined above, unless the debt or employer default is permitted under the exception above.

WITNESS THE FOLLOWING SIGNATURE:Vendor's Name: Berry Dunn McNeil & Parker, LLC (dba BerryDunn)Authorized Signature:  Date: June 10, 2014State of MaineCounty of Cumberland, to-wit:

Taken, subscribed, and sworn to before me this ___ day of _____, 20__.


My Commission expires _____, 20__.

AFFIX SEAL HERE**NOTARY PUBLIC** _____

CERTIFICATION AND SIGNATURE PAGE

By signing below, I certify that I have reviewed this Solicitation in its entirety, understand the requirements, terms and conditions, and other information contained herein; that I am submitting this bid or proposal for review and consideration; that I am authorized by the bidder to execute this bid or any documents related thereto on bidder's behalf; that I am authorized to bind the bidder in a contractual relationship; and that to the best of my knowledge, the bidder has properly registered with any State agency that may require registration.

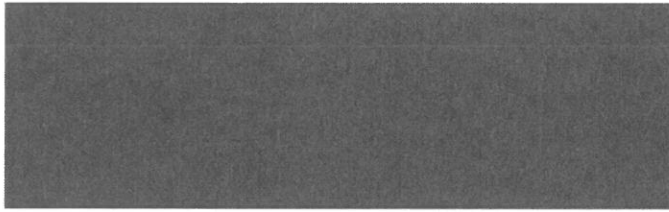
Berry Dunn McNeil & Parker, LLC (dba BerryDunn)
(Company)


(Authorized Signature)

Clinton E. Davies, Principal
(Representative Name, Title)

207-541-2322 207-774-2375
(Phone Number) (Fax Number)

June 10, 2014
(Date)



**BerryDunn's Cost Proposal to the
West Virginia Veterans Nursing Facility and
West Virginia Veterans Home for
Consulting Services to Assist with the Preparation of a
RFP for Electronic Medical Records**



*West Virginia Department of Veterans Assistance
West Virginia Veterans Nursing Facility*

Submitted in response to RFQ No. VNF 1040

Due Date: June 10, 2014
1:30 p.m. ET

Submitted by:

**Clinton E. Davies, MBA, CCP, FHIMSS, Principal
Daniel T. Vogt, BS, CPEHR, PMP, Manager
BerryDunn**

100 Middle Street

Portland, Maine 04101

Phone: (207) 775-2387

Fax: (207) 774-2375

Email: cdavies@berrydunn.com

dvogt@berrydunn.com



June 6, 2014

Mr. Dean Wingerd, Senior Buyer
State of West Virginia Department of Administration
Purchasing Division
2019 Washington Street East
Charleston, WV 25305-0130

Dear Mr. Wingerd:

Berry Dunn McNeil & Parker, LLC (BerryDunn) is pleased to submit this Cost Proposal to the West Virginia Purchasing Division in response to Request for Quotations Number VNF1040 for Consulting Services to Assist with the Preparation of a RFP for Electronic Medical Records. We have read the solicitation and addendum, we understand it, and we agree to the terms and conditions therein stated. Our proposal shall remain valid for 90 days from the proposal due date of June 10, 2014. As requested, we have provided our Technical Proposal under separate cover.

As a Principal of this firm and the leader of our Management and IT Consulting Group and Healthcare practice, I am legally authorized to execute this bid and any documents related thereto on BerryDunn's behalf, including binding BerryDunn in a contractual relationship for the work proposed herein.

Thank you for providing us with the opportunity to submit this proposal. Please contact me at (207) 541-2322 or via e-mail at cdavies@berrydunn.com if you have any questions regarding our proposal. We would enjoy the opportunity to work with WVNF and WVH on this important project and would be pleased to present our proposal to the Evaluation Committee to answer any questions you may have.

Sincerely,

A handwritten signature in black ink, appearing to read 'Clinton E. Davies', written over a horizontal line.

Clinton E. Davies
Principal

Official Address:

BerryDunn
100 Middle Street
Portland, Maine 04101

BerryDunn
300 Capitol Street, Suite 1610
Charleston, West Virginia 25301

PRICING PAGE (IN RESPONSE TO RFQ SECTION 5.2)

BerryDunn's all-inclusive lump sum bid to provide the services described in Section 1.0 of our Technical Proposal (Detailed Work Plan) this proposal is **\$83,894**. On the following page, we have provided a completed copy of the Pricing Page from the RFQ.

REQUEST FOR QUOTATION

VNF 1040 Consulting Services for Electronic Medical Records**Pricing Page**

Vendor should complete the Pricing Page by including a lump sum bid for the services in this RFQ and the winning vendor shall be responsible for all mileage and travel costs, including travel time, associated with performance of this contract. Any anticipated mileage or travel costs may be included in the flat fee listed in the Vendor's bid but costs will not be paid by the Agency separately. It should also include any other costs such as shipping charges, copying, printing, and/or mailing costs associated with this RFQ. Vendor should complete the Pricing Page in full as failure to complete the Pricing Page in its entirety may result in Vendor's bid being disqualified.

This should be a lump sum bid total \$83,894 _____

Signature  _____ Date June 10, 2014 _____