



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: 11-15-2024

CORRECT ORDER NUMBER MUST APPEAR  
 ON ALL PACKAGES, INVOICES, AND  
 SHIPPING PAPERS. QUESTIONS  
 CONCERNING THIS ORDER SHOULD BE  
 DIRECTED TO THE DEPARTMENT  
 CONTACT.

|                              |                               |                                 |                          |
|------------------------------|-------------------------------|---------------------------------|--------------------------|
| <b>Order Number:</b>         | CDO 0511 3839 MIS2400000009 5 | <b>Procurement Folder:</b>      | 1435631                  |
| <b>Document Name:</b>        | WV PATH Project Phase III     | <b>Reason for Modification:</b> |                          |
| <b>Document Description:</b> | Change Order 1 to adjust SOW  | Change Order 1<br>To adjust SOW |                          |
| <b>Procurement Type:</b>     | Central Delivery Order        |                                 |                          |
| <b>Buyer Name:</b>           | Crystal G Hustead             |                                 |                          |
| <b>Telephone:</b>            | (304) 558-2402                |                                 |                          |
| <b>Email:</b>                | crystal.g.hustead@wv.gov      |                                 |                          |
| <b>Shipping Method:</b>      | Best Way                      | <b>Master Agreement Number:</b> | CMA 0511 HHR2100000003 5 |
| <b>Free on Board:</b>        | FOB Dest, Freight Prepaid     |                                 |                          |

| VENDOR                         |                         |                            |                      | DEPARTMENT CONTACT  |                           |
|--------------------------------|-------------------------|----------------------------|----------------------|---|---------------------------|
| <b>Vendor Customer Code:</b>   | 000000100150            |                            |                      | <b>Requestor Name:</b>  | Kimberly A Beckett        |
| BERRY DUNN MCNEIL & PARKER LLC |                         |                            |                      | <b>Requestor Phone:</b>   | (304) 558-5906            |
| 2211 CONGRESS ST               |                         |                            |                      | <b>Requestor Email:</b>   | kimberly.a.beckett@wv.gov |
| PORTLAND                       |                         | ME                         | 04102                | <div style="font-size: 48px; font-weight: bold;">2025</div> <div style="font-weight: bold;">FILE LOCATION _____</div> |                           |
| US                             |                         |                            |                      |   |                           |
| <b>Vendor Contact Phone:</b>   | 6813138905              | <b>Extension:</b>          |                      |   |                           |
| <b>Discount Details:</b>       |                         |                            |                      |   |                           |
|                                | <b>Discount Allowed</b> | <b>Discount Percentage</b> | <b>Discount Days</b> |   |                           |
| #1                             | No                      | 0.0000                     | 0                    |   |                           |
| #2                             | No                      |                            |                      |   |                           |
| #3                             | No                      |                            |                      |   |                           |
| #4                             | No                      |                            |                      |   |                           |

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

|                            |                 |
|----------------------------|-----------------|
| <b>Total Order Amount:</b> | \$16,932,120.00 |
|----------------------------|-----------------|

Purchasing Division's File Copy

CA 11/25/24  
**PURCHASING DIVISION AUTHORIZATION**  
**DATE:** Tawana 11/25/24  
**ELECTRONIC SIGNATURE ON FILE**

**ENCUMBRANCE CERTIFICATION**  
**DATE:** 11-25-24  
**ELECTRONIC SIGNATURE ON FILE**

**Extended Description:**

Change Order  
Change Order 1 is issued to update SOW to include a new Deliverable at no-cost to the project. Total hours worked by staff are unchanged.

Effective Date: 11/15/2024

No other changes.

| Line         | Commodity Code | Quantity     | Unit | Unit Price | Total Price   |
|--------------|----------------|--------------|------|------------|---------------|
| 1            | 80101600       | 0.00000      |      | \$0.0000   | \$180,600.00  |
| Service From | Service To     | Manufacturer |      | Model No   | Delivery Date |
| 2024-06-15   | 2026-06-14     |              |      |            | 2024-06-14    |

**Commodity Line Description:** Lead Project Manager

**Extended Description:**

Lead Project Manager

Hourly Rate: \$215.00

| Line         | Commodity Code | Quantity     | Unit | Unit Price | Total Price   |
|--------------|----------------|--------------|------|------------|---------------|
| 2            | 80101600       | 0.00000      |      | \$0.0000   | \$259,200.00  |
| Service From | Service To     | Manufacturer |      | Model No   | Delivery Date |
| 2024-06-15   | 2026-06-14     |              |      |            | 2024-06-14    |

**Commodity Line Description:** Engagement Manager

**Extended Description:**

Engagement Manager

Hourly Rate: \$270.00

| Line         | Commodity Code | Quantity     | Unit | Unit Price | Total Price     |
|--------------|----------------|--------------|------|------------|-----------------|
| 3            | 80101600       | 0.00000      |      | \$0.0000   | \$14,580,000.00 |
| Service From | Service To     | Manufacturer |      | Model No   | Delivery Date   |
| 2024-06-15   | 2026-06-14     |              |      |            | 2024-06-14      |

**Commodity Line Description:** General Project Manager

**Extended Description:**

General Project Manager

Hourly Rate: \$180.00

| Line         | Commodity Code | Quantity     | Unit | Unit Price | Total Price    |
|--------------|----------------|--------------|------|------------|----------------|
| 4            | 80101600       | 0.00000      |      | \$0.0000   | \$1,912,320.00 |
| Service From | Service To     | Manufacturer |      | Model No   | Delivery Date  |
| 2024-06-15   | 2026-06-14     |              |      |            | 2024-06-14     |

**Commodity Line Description:** Project Management Support Staff

**Extended Description:**

Project Management Support Staff

Hourly Rate: \$80.00



September 27, 2024

To Whom It May Concern,

BerryDunn is submitting a cost-neutral Change Request (CR) to the West Virginia Department of Human Services (DoHS) and Office of Shared Administration (OSA) Management Information Services (MIS) Project Management Services for the West Virginia People's Access to Help (PATH) Project Phase III (CDO 0511 3839 MIS2400000009 1). The cost-neutral CR is to reallocate 800 hours from Deliverable/Service, Approach, and Acceptance Criteria Ref #s 1 through 10 to a new Deliverable/Service, Approach, and Acceptance Criteria Ref # 11, titled 'Procurement Support'. Please let me know if you have any questions or if you would like to discuss the content of this CR for the PATH Project.

We are pleased to have the opportunity to continue providing important project management and subject matter expert services to the State of West Virginia (State).

Best Regards,

DocuSigned by:  
  
2DAAA41ADB3A477...  
Peter Alfrey  
Principal  
207-541-2242

Agreed





**M E M O R A N D U M**

**TO:** Shaun Charles, Chief Information Officer (CIO), Office of Shared Administration (OSA) Department of Human Services (DoHS)  
 Cynthia Beane, Commissioner, West Virginia Bureau for Medical Services (BMS)  
 Sarah Young, Deputy Commissioner, Policy Coordination & Operations, BMS

**CC:** Brandon Lewis, Director, Office of Enterprise Systems, DoHS

**FROM:** Peter Alfrey, Principal, BerryDunn

**RE:** West Virginia Medicaid People's Access to Help (PATH) (CDO 0511 3839 MIS240000009 1). Change Request (CR): Cost-neutral reallocation of hours.

**DATE:** September 27, 2024

**Change Request:** The cost-neutral CR is to reallocate 800 hours from Deliverable/Service, Approach, and Acceptance Criteria Ref #s 1 through 10 to a new Deliverable/Service, Approach, and Acceptance Criteria Ref # 11, titled 'Procurement Support'.

Table 1 below shows the revised Scope of Work (SOW) 'Table 1: Project Deliverable/Service Approach, Responsibility, and Hours Estimate'. Ref #s 1 through 10 have been reduced by 800 hours, cumulatively. Ref # 11 has been added, with the *Service Approach* added and hours estimate of 800 hours added.

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

| Ref # | Deliverable/Service, Approach, and Acceptance Criteria   | Responsible   | Hours Estimate |
|-------|--|---|----------------|
| 1.0   | <p><b>Engagement Oversight</b></p> <p><i>Service Approach</i></p> <p>BerryDunn's leadership team will oversee and coordinate BerryDunn staff, services, and deliverables. BerryDunn's project leadership will regularly meet with the BerryDunn project lead and other key team members to discuss project status and issues impacting timely completion of the project work and oversee BerryDunn staff, services, and review of deliverables.</p> <p><i>Deliverable(s)</i></p> <p>There will be no Project Management Office (PMO)</p> | <p>Nicole Bechel</p> <p>Brandon Milton</p> <p>Alex Lyubarov</p> <p>Dawn Webb</p> <p>Ed Daranyi</p> <p>Emily McCoy</p> <p>Peter Alfrey</p> | 5,489          |



|     |   |   |        |
|-----|---|---|--------|
|     | <p>deliverables supplied in support of Engagement Oversight.</p> <p><i>Completion Criteria</i></p> <p>All parties will deem Engagement Oversight complete upon successful completion of the project and acceptance of Deliverable 6: Project Closeout Summary by the project sponsor or his/her designee.</p>   |   |        |
| 2.0 | <p><b>Monthly Project Status Reporting</b></p> <p><i>Service Approach</i></p> <p>BerryDunn will create and submit Commissioner briefings and monthly project status reports to BMS, the DoHS project sponsors, and/or the federal partners to provide objective reporting on the health of the project. The details contained within the project readiness assessments are meant to provide the overall health of specific milestones, deployments, and other events. The project status reports are intended to supply higher-level reporting on the status of project deliverables, timeline, and associated project issues and risks. The project readiness assessments and status reports will be developed, reviewed, and finalized during the first two weeks of each calendar month for the project's life.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> <li>• D01: Commissioner Briefings</li> <li>• D02: Monthly Project Status Reports</li> </ul> <p><i>Completion Criteria</i></p> <p>All parties will deem Monthly Project Status Reporting complete upon successful completion of the project and acceptance of Deliverable 6: Project Closeout Summary by the project sponsor or his/her designee.</p> | <p>Brandon Milton<br/>Adam Bowman<br/>Alex Lyubarov<br/>Alex Tannenbaum<br/>Allison Marler<br/>Ana Petrillo<br/>Katie Weidner<br/>Lacey Cannon<br/>Lorrie Davenport<br/>Mallary Tiffany<br/>Mara Cooper<br/>Neal Winn<br/>Nora Gilligan<br/>Payton Waybright<br/>Rakesh Kuttoppillil<br/>Samuel Kessler<br/>Shaun Meeks<br/>Sudha Ganapathy<br/>Tahsin Zakaria<br/>Vivian de la Gandara<br/>Hailey Holden<br/>Katie McDonald<br/>Cate Poling<br/>Kourtney Kirk<br/>Shandia Benke<br/>Morgan Krieger</p> | 6,308  |
| 3.0 | <p><b>Project Management Support</b></p> <p><i>Service Approach</i></p> <p>BerryDunn will provide Project Management Services for the PATH project. Upon project initiation of this SOW, BerryDunn will confirm agreed-upon expectations for the management of the project. BerryDunn Project Management Services will include:</p>   | <p>Adam Bowman<br/>Allison Marler<br/>Ana Petrillo<br/>Katie Weidner<br/>Lacey Cannon<br/>Lorrie Davenport<br/>Mallary Tiffany<br/>Mara Cooper</p>  | 28,886 |



|            |  |  |               |
|------------|--|--|---------------|
|            | <ul style="list-style-type: none"> <li>• Meeting facilitation, preparation of meeting materials, and note-taking for BerryDunn- and State-owned meetings (as requested)</li> <li>• Management of project logs (action items, risks, issues, and decisions)</li> <li>• Location of a project documentation repository in an agreed-upon SharePoint location</li> </ul> <p>BerryDunn will facilitate weekly meetings with the State project sponsor and project lead to discuss project status across each project area. BerryDunn will use this time to make the State aware of project risks, issues, and/or items that may require its attention. BerryDunn will also use this time to plan risk and issue mitigation and responses.</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"> <li>• Meeting agendas</li> <li>• Meeting notes</li> <li>• Meeting tracking logs</li> <li>• Action item tracking logs</li> <li>• Risks and issues register</li> <li>• Project decision logs</li> <li>• Weekly workshop and workgroup coverage calendars</li> </ul> <p><i>Completion Criteria</i></p> <p>All parties will deem Project Management Support complete upon successful completion of the project and acceptance of Deliverable 6: Project Closeout Summary by the project sponsor or his/her designee.</p> | <p>Neal Winn<br/>                 Nora Gilligan<br/>                 Payton Waybright<br/>                 Rakesh Kuttoppillil<br/>                 Samuel Kessler<br/>                 Shaun Meeks<br/>                 Sudha Ganapathy<br/>                 Tahsin Zakaria<br/>                 Vivian de la Gandara<br/>                 Eileen Gardner<br/>                 Hailey Holden<br/>                 Katie McDonald<br/>                 Cate Poling<br/>                 Kourtney Kirk<br/>                 Shandia Benke<br/>                 Jonathan Pryor<br/>                 Katelyn Smith<br/>                 Ryan Daniels<br/>                 Morgan Krieger<br/>                 Muriah Nutter<br/>                 Alycia Minshall<br/>                 Caitlin Cabral<br/>                 Carole Ann Guay<br/>                 Emily Hendrickson<br/>                 Janine DiLorenzo<br/>                 Jonathan Williams<br/>                 Jordan Ramsey<br/>                 Megan Hamilton<br/>                 KD Dobyne</p> |               |
| <p>4.0</p> | <p><b>Requirements Management Subject Matter Expertise</b></p> <p><i>Service Approach</i></p> <p>BerryDunn will provide overall Project Management Services to support the continued implementation of PATH project requirements. Throughout the design, testing, and implementation of additional PATH deployments, the State and BerryDunn will work with the vendor to clarify and validate the design for each deployed requirement.</p> <p>To help ensure the requirements are representative of the State and the vendor's agreed-upon solution, BerryDunn will assign leads to assist the State during the review. The leads will be the State's primary points</p>   | <p>Agnes Beeks-Smith<br/>                 Darrah Ruiz<br/>                 Lacey Cannon<br/>                 Mallary Tiffany<br/>                 Mara Cooper<br/>                 Michelle Shores<br/>                 Milan Kelly<br/>                 Neal Winn<br/>                 Reanna Jones<br/>                 Sudha Ganapathy<br/>                 Tahsin Zakaria</p>  | <p>12,964</p> |



|            |   |  |               |
|------------|---|--|---------------|
|            | <p>of contact for each module area and will work with BerryDunn and the vendor to define, clarify, and test the applicable requirements.</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><i>Outputs</i></p> <p>The following outputs will be produced as part of this service:</p> <ul style="list-style-type: none"> <li>• Action item tracking reports</li> <li>• Research summaries (as requested)</li> <li>• Impact analyses (as requested)</li> </ul> <p><i>Completion Criteria</i></p> <p>All parties will deem Requirements Management Subject Matter Expertise complete upon successful completion of the project and acceptance of Deliverable 6: Project Closeout Summary by the project sponsor or his/her designee.</p> | <p>Tamara Batts<br/>                 Krista 'Rosie' Owens<br/>                 Morgan Krieger</p>  |               |
| <p>5.0</p> | <p><b>Deliverable Management and Review</b></p> <p><i>Service Approach</i></p> <p>BerryDunn will utilize its standardized approach to monitor and provide management oversight for the quality of project deliverables, artifacts, and other work products submitted by the vendor. BerryDunn's approach will consist of the following elements:</p> <ul style="list-style-type: none"> <li>• BerryDunn will facilitate, track, and manage vendor- and PMO-owned deliverables. Project deliverables will be stored in an agreed-upon SharePoint location.</li> <li>• BerryDunn will develop, review, and finalize deliverable acceptance criteria with the vendor and the State.</li> <li>• BerryDunn will participate in vendor-facilitated draft reviews of contract deliverables (as needed).</li> <li>• BerryDunn will review vendor-owned contract deliverables for alignment with acceptance criteria and contract requirements.</li> </ul>   | <p>Adam Bowman<br/>                 Agnes Beeks-Smith<br/>                 Alex Tannenbaum<br/>                 Allison Marler<br/>                 Darrah Ruiz<br/>                 Katie Weidner<br/>                 Lacey Cannon<br/>                 Lorrie Davenport<br/>                 Mallery Tiffany<br/>                 Mara Cooper<br/>                 Michelle Shores<br/>                 Neal Winn<br/>                 Rakesh Kuttoppillil<br/>                 Reanna Jones<br/>                 Samuel Kessler<br/>                 Sudha Ganapathy<br/>                 Tahsin Zakaria<br/>                 Tamara Batts</p> | <p>15,860</p> |



|                   |  |  |               |
|-------------------|--|--|---------------|
|                   | <ul style="list-style-type: none"> <li>• BerryDunn will participate in vendor-facilitated formal reviews of contract deliverables (as needed).</li> <li>• BerryDunn will collaboratively resolve comments on vendor-owned deliverables.</li> <li>• BerryDunn will create and obtain signature approval on each PMO- and vendor-owned project deliverable.</li> </ul> <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>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"> <li>• Deliverable comment logs</li> <li>• Deliverable review tracking logs</li> <li>• Deliverable review training materials</li> <li>• Deliverable review Responsible, Accountable, Consulted, and Informed (RACI) Matrix</li> </ul> <p><i>Completion Criteria</i></p> <p>All parties will deem Deliverable Management and Review complete upon successful completion of the project and acceptance of Deliverable 6: Project Closeout Summary by the project sponsor or his/her designee.</p> | <p>Katelyn Smith<br/>                 Krista 'Rosie' Owens<br/>                 Morgan Krieger</p>   |               |
| <p><b>6.0</b></p> | <p><b>Federal Review and Certification Support</b></p> <p><i>Service Approach</i></p> <p>BerryDunn will provide overall Project Management Services support for required federal reviews and certification. This includes assisting the State with developing the approach, process, and methodologies used to manage the project and creating associated</p>  | <p>Adam Bowman<br/>                 Alex Tannenbaum<br/>                 Ana Petrillo<br/>                 Katie Weidner<br/>                 Lacey Cannon<br/>                 Mallary Tiffany<br/>                 Mara Cooper</p> | <p>10,682</p> |





|            |  |  |               |
|------------|--|--|---------------|
|            | <p>deliverables required for federal reviews and certification.</p> <p>BerryDunn will work with the State and the federal partners to identify the documentation needed to assist the State in the review and certification efforts required to complete the project. BerryDunn will also provide support services by scheduling, facilitating, and managing federal on-site visits or reviews.</p> <p>BerryDunn will provide support services to the State by leveraging and reusing the State's existing functionality and processes to prevent unnecessary duplication.</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"> <li>• Certification and Compliance templates</li> <li>• Certification and Compliance approach documentation</li> <li>• Training materials</li> <li>• Research summaries</li> </ul> <p><i>Completion Criteria</i></p> <p>All parties will deem Federal Review and Certification Support complete upon successful completion of the project and acceptance of Deliverable 6: Project Closeout Summary by the project sponsor or his/her designee.</p> | <p>Neal Winn<br/>                 Nora Gilligan<br/>                 Roshani Raghani<br/>                 Samuel Kessler<br/>                 Sudha Ganapathy<br/>                 Vivian de la Gandara<br/>                 Morgan Krieger</p>  |               |
| <p>7.0</p> | <p><b>Testing Support</b></p> <p><i>Service Approach</i></p> <p>BerryDunn will provide resources to assist DoHS with System Integration Testing (SIT) and User Acceptance Testing (UAT) efforts.</p> <p>Assistance during SIT and UAT is outlined as follows:</p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• BerryDunn will maintain the UAT Plan and assist DoHS in developing UAT test scenarios.</li> <li>• BerryDunn will assist the State with the coordination and facilitation of UAT, tracking UAT outcomes and issues and defects identified during this testing phase.</li> </ul> <p>To help ensure the requirements are representative of the State and the vendor's agreed-upon solution, BerryDunn's assigned leads will assist each program through the testing effort. These individuals will be the</p>  | <p>Adam Bowman<br/>                 Agnes Beeks-Smith<br/>                 Darrah Ruiz<br/>                 Lacey Cannon<br/>                 Mallary Tiffany<br/>                 Mara Cooper<br/>                 Michelle Shores<br/>                 Milan Kelly<br/>                 Neal Winn<br/>                 Reanna Jones<br/>                 Sudha Ganapathy<br/>                 Tahsin Zakaria<br/>                 Tamara Batts<br/>                 Krista 'Rosie' Owens<br/>                 Morgan Krieger</p> | <p>16,000</p> |



|     |  |  |       |
|-----|--|--|-------|
|     | <p>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>Deliverable(s) and Outputs</i></p> <ul style="list-style-type: none"> <li>D03: Updated DoHS UAT Plan Review of SIT test cases, SIT test results, and UAT test case review comment logs Review of UAT templates (e.g., test case scenarios) Delivery of UAT execution reporting (e.g., overall UAT status, defect tracking)</li> </ul> <p><i>Completion Criteria</i></p> <p>All parties will deem Testing Support complete upon successful completion of the project and acceptance of Deliverable 6: Project Closeout Summary by the project sponsor or his/her designee.</p> |  |       |
| 8.0 | <p><b>APD Support</b></p> <p><i>Service Approach</i></p> <p>BerryDunn will develop and assist in facilitating the approval of APDs to help ensure that the project continues to maintain buy-in and financial backing from the relevant federal partners.</p> <p><i>Deliverable</i></p> <ul style="list-style-type: none"> <li>D04: IAPD</li> <li>D05: Operational Advance Planning Document (OAPD)</li> </ul> <p><i>Completion Criteria</i></p> <p>All parties will deem APD Support complete upon successful completion of the project and acceptance of Deliverable 6: Project Closeout Summary by the project sponsor or his/her designee.</p>   | <p>Brandon Milton<br/>Adam Bowman<br/>Alex Lyubarov<br/>Alex Tannenbaum<br/>Mallary Tiffany<br/>Nora Gilligan</p>  | 447   |
| 9.0 | <p><b>OCM Support</b></p> <p><i>Service Approach</i></p> <p>Organizational change is a fundamental component of most system implementations, particularly one of this size. As such, BerryDunn will work with DoHS on continuing to refine and implement the change management methodology that was implemented in Phase II. In alignment with a proven methodology, BerryDunn's approach to providing change management in its work with DoHS will occur by:</p> <ul style="list-style-type: none"> <li><b>Managing Change:</b> involves overseeing assigned roles and tasks, providing training and coaching, using tools effectively, and exercising clear communication.</li> </ul>  | <p>Adam Bowman<br/>Agnes Beeks-Smith<br/>Allison Marler<br/>Darrah Ruiz<br/>Lacey Cannon<br/>Mallary Tiffany<br/>Mara Cooper<br/>Michelle Shores<br/>Milan Kelly<br/>Neal Winn<br/>Reanna Jones<br/>Sudha Ganapathy<br/>Tahsin Zakaria</p> | 9,183 |



|      |   |   |     |
|------|---|---|-----|
|      | <ul style="list-style-type: none"> <li>• <b>Reinforcing Change:</b> involves evaluating action plans, reviewing the sustainability of change management activities, and promoting individual and team successes.</li> </ul> <p><i>Completion Criteria</i><br/>All parties will deem OCM Support complete upon successful completion of the project and acceptance of Deliverable 6: Project Closeout Summary by the project sponsor or his/her designee.</p>  | <p>Tamara Batts<br/>Krista 'Rosie' Owens<br/>Morgan Krieger</p>   |     |
| 10.0 | <p><b>Project Closeout</b><br/>BerryDunn will prepare a Project Closeout Summary that includes an inventory of all project documentation and deliverables BerryDunn will transfer to DoHS at project close. Additionally, the Summary will document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> <li>• D06: Project Closeout Summary</li> </ul> <p><i>Completion Criteria</i><br/>All parties will deem BerryDunn services complete upon formal acceptance of Deliverable 6: Project Closeout Summary by the project sponsor or his/her designee.</p>  | <p>Nicole Becnel<br/>Brandon Milton<br/>Adam Bowman<br/>Alex Lyubarov<br/>Alex Tannenbaum<br/>Dawn Webb<br/>Ed Daranyi<br/>Emily McCoy<br/>Mallary Tiffany<br/>Nora Gilligan<br/>Peter Alfrey</p> | 85  |
| 11.0 | <p><b>Procurement Support</b><br/><i>Service Approach</i><br/>BerryDunn will provide procurement support to assist the State in managing vendor solicitation, selection, and contract negotiations. The BerryDunn team will collaborate with State stakeholders to help ensure a comprehensive procurement process, addressing key project requirements, vendor capabilities, and budget considerations. BerryDunn's procurement support will include:</p> <ul style="list-style-type: none"> <li>• Assisting in the development of Requests for Proposals (RFPs) and Invitations for Bids (IFBs).</li> <li>• Coordinating with State legal and procurement teams to ensure compliance with State procurement regulations.</li> <li>• Facilitating the evaluation of vendor proposals, including the establishment of evaluation criteria, scoring rubrics, and the organization of proposal review committees.</li> <li>• Supporting the interview and demonstration process to assess vendor qualifications.</li> </ul> | <p>Nicole Becnel<br/>Brandon Milton<br/>Alex Lyubarov<br/>Alex Tannenbaum</p>   | 800 |



|  |   |  |                     |
|--|---|--|---------------------|
|  | <ul style="list-style-type: none"><li>Assisting in contract negotiations by providing input on technical, operational, and financial aspects to ensure alignment with project goals and the State's best interests.</li></ul> <p><i>Completion Criteria</i></p> <p>All parties will deem Procurement Support complete upon the successful selection of a vendor, formal contract approval by the State, and the acceptance of Deliverable 6: Project Closeout Summary by the project sponsor or designee.</p> |  |                     |
| <b>Total Hours</b>                       |   |  | <b>106,704</b>      |
| <b>Total Not-To-Exceed Cost Estimate</b> |   |  | <b>\$16,932,120</b> |

 11/6/24



**Sherri A. Young, D.O.,  
MBA, FAAFP  
DH Cabinet Secretary**



**Michael J. Caruso  
DHF Cabinet Secretary**



**Cynthia A. Persily, Ph.D.  
DoHS Cabinet Secretary**

STATE OF WEST VIRGINIA  
DEPARTMENTS OF HEALTH, HEALTH FACILITIES, AND HUMAN SERVICES

Office of Management Information Services | Shaun Charles, Chief Information Officer

**Date:** November 15, 2024

**To:** Office of Shared Administration  
Purchasing Department

**From:** Kimberly Beckett, Procurement Associate *KB*  
Management Information Services

**Re:** CDO MIS24\*09 No-Cost Change Order  
PATH Project Phase III

The Office of Management Information Services is requesting approval for the above-mentioned project with Berry Dunn. This request is to allow them to add new deliverables at no cost to the project. Your approval is greatly appreciated.



# COMPLIANCE VERIFICATION CHECKLIST FOR REQUISITION SUBMISSION

|   |  |
|---|--|
| <i>Purchasing Division Use:</i><br>Buyer: <u>Crystal Husted</u> Date: <u>11/25/24</u><br><br>Solicitation No. <u>CDO MIS24*09</u> | Agency:<br>Management Information Services<br><br>Procurement Officer Submitting Requisition:<br>Kimberly Beckett<br><br>Requisition No.<br>CDO MIS24*09<br><br>PF No.:<br>1435631 |
|---|--|

This checklist **MUST** be completed by a state agency's designated procurement officer and submitted with the Purchase Requisition to the Purchasing Division. The purpose of the checklist is to verify that an agency procurement officer has obtained and included required documentation necessary for the Purchasing Division to process the requisition without future processing disruptions. At the agency's preference, the agency **MUST** either submit the checklist by attaching it to the requisition's Header **OR** by placing it in the requisition's Procurement Folder.

## FOR ALL SOLICITATION TYPES:

|   | Compliance Check Type  | Required                            | Provided, if Required    | Not Required             | Purch. Div. Confirmation |
|---|--|-------------------------------------|--------------------------|--------------------------|--------------------------|
| 1 | Specifications and Pricing Page included   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Use of correct specification template  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Use of correct requisition type<br>[CRQS → CCT or CPO] or [CRQM → CMA]   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Use of most current terms and conditions<br>( <a href="http://www.state.wv.us/admin/purchase/TCP.pdf">www.state.wv.us/admin/purchase/TCP.pdf</a> ) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 | Maximum budgeted amount in wvOASIS   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 | Suggested vendors in wvOASIS   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7 | Capitol Building Commission pre-approval   | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8 | Financing (Governor's Office) pre-approval   | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9 | Fleet Management Division pre-approval   | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

|           | Compliance Check Type                      | Required                 | Provided, if Required    | Not Required             | Purch. Div. Confirmation |
|-----------|--|--------------------------|--------------------------|--------------------------|--------------------------|
| <b>10</b> | Insurance requirements                     |                          |                          |                          |                          |
|           | Commercial General Liability               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|           | Automobile Liability                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|           | Workers' Compensation/Employer's Liability | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|           | Cyber Liability                            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|           | Builder's Risk/Installation Floater        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|           | Professional Liability                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|           | Other (specify)                            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>11</b> | Office of Technology CIO pre-approval      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>12</b> | Treasurer's Office (banking) pre-approval  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**FOR CHANGE ORDERS/RENEWALS:**

|          |  |                                     |                                     |                          |                                     |
|----------|--|-------------------------------------|-------------------------------------|--------------------------|-------------------------------------|
| <b>1</b> | Two-party agreement                                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| <b>2</b> | Standard change order language                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| <b>3</b> | Office of Technology CIO approval                  | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            |
| <b>4</b> | Justification for price increases/backdating/other | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            |
| <b>5</b> | Bond Rider (Construction)                          | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            |
| <b>6</b> | Secretary of State Verification                    | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| <b>7</b> | State debarment verification                       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| <b>8</b> | Federal debarment verification                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

\*The items pre-checked are required before a Purchase Requisition may be submitted to the Purchasing Division. Failure to complete and verify this documentation may result in rejection of the requisition back to the agency. It is up to the agency procurement officer to determine if pre-approvals, insurance, or other documentation is needed for the purchase. The referenced information below may be used to make this determination.

For Purchasing Division Use Only:

I have reviewed the requisition identified above and find that it is sufficient to advertise publicly to the vendor community. My review does not preclude the possibility that the vendor community, or some other entity, will identify an area of concern; however, should such issues or concerns arise, they will be reviewed and addressed as may be appropriate.

Signature: \_\_\_\_\_


*Crystal Husband*


## Keyword Search


For more information on how to use our keyword search, visit our help guide

Simple Search

Search Editor

Any Words 

All Words 

Exact Phrase 

e.g. 123456789, Smith Corp

"berry dunn mcneil & parker llc" 

Entity 

Location 

Status 

Active

Inactive

Reset 



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## West Virginia Secretary of State — Online Data Services

### Business and Licensing

Online Data Services Help

### Business Organization Detail

*NOTICE: The West Virginia Secretary of State's Office makes every reasonable effort to ensure the accuracy of information. However, we make no representation or warranty as to the correctness or completeness of the information. If information is missing from this page, it is not in the The West Virginia Secretary of State's database.*

### BERRY, DUNN, MCNEIL & PARKER, LLC

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

| Organization Information  |  |                           |   |
|---------------------------|--|---------------------------|---|
| <b>Business Purpose</b>   | 5511 - Management of Companies and Enterprises - Management of Companies and Enterprises - Management of Companies and Enterprises Including Offices of Bank Holding Companies and Other Holding Companies |                           | <b>Capital Stock</b>                                  |
| <b>Charter County</b>     | Kanawha  | <b>Control Number</b>     | 0   |
| <b>Charter State</b>      | ME   | <b>Excess Acres</b>       | <span>× Close</span>                                  |
| <b>At Will Term</b>       | A  | <b>M</b>                  | Hi, I'm SOLO! I can help you file your Annual Report. |
| <b>At Will Term Years</b> |  | <b>Pa</b>                 |   |
| <b>Authorized Shares</b>  |  | <b>Young Entrepreneur</b> | Not Specified   |

**Addresses**

| Type                             | Address  |
|----------------------------------|--|
| <b>Designated Office Address</b> | 209 WEST WASHINGTON STREET<br>CHARLESTON, WV, 25302                                |
| <b>Mailing Address</b>           | 2211 CONGRESS STREET<br>PORTLAND, ME, 04102<br>USA                                 |
| <b>Notice of Process Address</b> | CORPORATION SERVICE COMPANY<br>209 WEST WASHINGTON STREET<br>CHARLESTON, WV, 25302 |
| <b>Principal Office Address</b>  | 2211 CONGRESS STREET<br>PORTLAND, ME, 04102<br>USA                                 |
| Type                             | Address  |

**Officers**

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

**DBA**

| DBA Name                           | Description | Effective Date | Termination |
|------------------------------------|-------------|----------------|-------------|
| BERRY DUNN                         | TRADENAME   |                |             |
| BERRY, DUNN, MCNEIL & PARKER, PLLC | TRADENAME   | 11/5/2019      |             |

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## Annual Reports

| Filed For  |
|------------|
| 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.

Monday, November 25, 2024 — 8:14 AM

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