



Proposal For

# Arizona Health Care Cost Containment System

Task Order YH23-0128

Medicaid Enterprise System (MES),  
Independent Verification and Validation  
(IV&V)

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**Proposal Submitted On:**  
**June 14, 2023**



## Transmittal Letter

June 14, 2023

Lisa Monreal  
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AHCCCS Division of Business and Finance  
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Sent via email to: [Procurement@azahcccs.gov](mailto:Procurement@azahcccs.gov)

Dear Lisa Monreal:

Berry, Dunn, McNeil & Parker, LLC (BerryDunn) is pleased to submit this proposal to the Arizona Health Care Cost Containment System (AHCCCS) in response to Task Order YH23-0128, for Medicaid Enterprise System (MES), Independent Verification and Validation (IV&V) through our IT Advisory, Assessment, Verification and Validation – Consulting Services contract.

Our approach to every project we support is simple: **consistently provide high-quality services and strive for unparalleled client satisfaction.** You can feel confident selecting BerryDunn and our team of experienced professionals—backed by over 800 full-time employees. We have the expertise, proven methodologies, and experienced resources to assist AHCCCS in meeting its goal of providing IV&V services to support AHCCCS modernization technical implementation projects. Based on Task Order YH23-0128, including Attachment A, we understand the technical implementation projects include Case Management, Hearing and Grievances, Refactor Prepaid Medicaid Management Information System (PMMIS)/Hawaii Prepaid Medicaid Management Information System (HPMMIS), Systems Integration, ServiceNow, and the mainframe modernization project.

As you evaluate which partner is right for you, please consider the following:

- ***We are independent and objective.*** We do not enter into partnerships with companies that could impair our objectivity. Not being a systems integrator or software development company allows us to make unbiased, independent recommendations. Further, BerryDunn does not partner with, consult for, or subcontract with IT systems vendors or fiscal agents. Our independence and ability to focus on the needs of AHCCCS helps BerryDunn serve as a trusted advisor. We are uniquely positioned to provide objective guidance to AHCCCS.
- ***Over 35 years of IV&V experience with state HHS agencies.*** BerryDunn provides the experience and expertise required to help ensure the success of the MES projects undertaken by AHCCCS, including Case Management, Hearing and Grievances, Refactor PMMIS/HPMMIS, Systems Integration, ServiceNow, and the mainframe modernization project. Through our experience performing IV&V services to health and human services (HHS) and Medicaid agencies in states such as Maine, Maryland, Massachusetts, Missouri, New Hampshire, and Ohio, we have developed an IV&V methodology that reflects standards such as the Institute of Electrical and Electronics Engineers (IEEE) and the Project Management Body of Knowledge® (PMBOK® Guide). We will tailor our approach to AHCCCS and the projects, allowing our team to immediately add value and support project success. In addition, our project team will build upon the lessons

learned from our current and past IV&V engagements and consider opportunities for collaboration and reusability.

- ***An IV&V approach that provides valuable findings and actionable recommendations.*** HHS agencies across the United States lament their experiences with contractors that “check the box” for IV&V work and simply “go through the motions” of identifying issues. Since 2016, the Ohio Medicaid Enterprise System (OMES) program has benefited from the meaningful and actionable reporting and recommendations provided by BerryDunn’s IV&V project team. For example, by implementing an IV&V recommendations tracker process workflow, the OMES program is now better positioned to respond to IV&V recommendations timely as it implements a modernized modular Medicaid Management Information System (MMIS). This enabled OMES program leadership to successfully introduce a state-managed tool in collaboration with their IV&V partner for the Ohio Department of Medicaid (ODM), module vendor leads, and stakeholders to observe IV&V recommendations and provide either a mitigation strategy and acceptance of the recommendation, not accepting the recommendation and accepting the risk identified, or by requesting a revised recommendation. The collaboration experience is a testament to the dialog created through use of the actionable recommendations and tracker process workflow. BerryDunn would like to introduce AHCCCS and the projects to a recommendations tracker process workflow that is used with our Ohio client. In selecting BerryDunn, AHCCCS leadership will receive significant value from our IV&V team that will positively impact and enhance MES projects.
- ***Commitment to Arizona.*** BerryDunn has demonstrated our commitment to the State of Arizona by opening a Phoenix-based office in 2014 and growing our local workforce by 40% to 50% each year to better serve our clients in Arizona and the Southwest. We are proud to have earned a solid reputation with the State through our work with the following clients:
  - Arizona Department of Agriculture
  - Arizona Department of Economic Security (ADES), Division of Benefits and Medical Eligibility
  - ADES, Division of Developmental Disabilities
  - AHCCCS
  - City of Avondale
  - City of Gilbert
  - City of Glendale
  - City of Goodyear
  - City of Phoenix
  - City of Scottsdale
  - City of Surprise
  - City of Tempe
  - City of Tucson
  - Coconino County
  - Maricopa County
- ***A stable and well-established firm.*** BerryDunn has been in business for 49 years and has grown consistently year after year, without a change in ownership. We have successfully completed numerous multiyear, high-profile engagements and served the same clients for 5 to 20-year durations. BerryDunn’s longevity and stability provides our clients with confidence when engaging us to assist with large and complex projects.



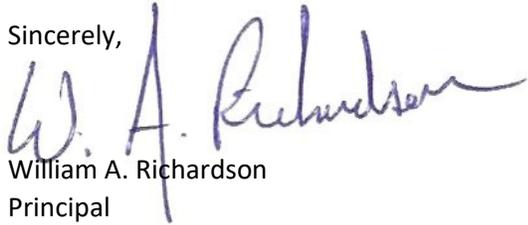
Our BerryDunn IV&V team will provide AHCCCS with a team that is independent, objective, and will provide valuable and high-quality services. Our proposed team has years of hand-on IV&V experience and will strive for client satisfaction through a no-surprises approach.

We would like to propose the following exceptions to the Business Associate Addendum:

- Page 9, section 2.3.1: We request five business days to report unauthorized use or disclosure to allow sufficient time to properly investigate.
- Page 12, section 6.1: We ask for an exception to the indemnification language to the extent it applies to professional services. BerryDunn has a robust professional liability policy for acts or omissions of BerryDunn, our agents, employees, and subcontractors. This policy contains language that states that it will not apply if BerryDunn takes on additional liabilities under contract, such as the agreement to indemnify. To help ensure that our clients have the protection of this policy, we propose to use the following language instead: "The Contractor agrees, to the fullest extent permitted by law, to indemnify and hold harmless the Client against damages, liabilities and costs arising from the negligent acts of the Contractor in the performance of professional services under this Agreement, to the extent that the Contractor is responsible for such damages, liabilities and costs on a comparative basis of fault and responsibility between the Contractor and the Client. The Contractor shall not be obligated to indemnify the Client for the Client's own negligence."

As a principal in our Consulting Services Team, I am authorized to bind BerryDunn to the commitments made herein. Should you have questions, please contact me at 207-842-8023 or via email at [brichardson@berrydunn.com](mailto:brichardson@berrydunn.com).

Sincerely,



William A. Richardson  
Principal

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## 1 — Methodology and Approach

### 1.1 — Methodology and Approach for Requirements

IV&V is a core service for BerryDunn, and we offer AHCCCS our disciplined IV&V framework, which will integrate management and service delivery consistently across AHCCCS’s MES projects, while also promoting the flexibility necessary for continuous improvement. BerryDunn’s IV&V service framework is a culmination of IV&V best practices refined over 35 years of practical, hands-on application of IV&V competencies. Our IV&V team will use this framework throughout our role as your IV&V partner and leverage our IV&V expertise and experience in providing IV&V services on similar projects for clients such as Maine, Massachusetts, Missouri, and Ohio.

When we work in the IV&V role, we strive to integrate with project teams and contribute in a manner that promotes a successful project outcome. To facilitate our IV&V services approach, Figure 1 shows BerryDunn’s four-step IV&V services approach—Plan, Review, Assess, and Report.

Figure 1: IV&V Services Approach



#### Step 1 – Plan

The planning step is integral to help ensure a successful engagement. During this step, we will document AHCCCS’ objectives, scope, and deliverables and outline the activities necessary for project startup. We understand that the scope, schedule, and/or budget of a project might change after it is underway due to the dynamic project environment and/or new information discovered during project activities. BerryDunn encounters these changes regularly in our work with public agencies; we are adept at addressing them in partnership with our clients and are accustomed to the need to be flexible. In our experience, transparency, honesty, and communication are key factors in successfully navigating these changes. At project initiation, our project manager, Buffy Cranford, will discuss the process to manage project changes. If the need for changes arises, we will alert AHCCCS and work together to determine an appropriate resolution.

#### Step 2 – Review

Our IV&V team will review and observe program and process procedures for Case Management, Hearing and Grievance, and the Refactor of PMMIS/HPMMIS as outlined in the MES Modernization Roadmap, working to uncover potential underlying issues and obstacles. We will maintain regular engagement with team members and stakeholders to build relationships, trust, and credibility. Observation of program and project meetings and activities will help us understand the approach, methodologies, and tools being used for the MES modules. This understanding, coupled with our extensive industry knowledge, will enable us to identify areas of focus that might require additional research and fact-finding activities.

#### Step 3 – Assess

With large and complex projects, an effective IV&V team can help drive project success by verifying, validating, and providing assessments as AHCCCS configures Case Management and Hearing and Grievance operational assets, and procurement and design of the Refactoring of PMMIS/HPMMIS from the MES Modernization Roadmap. We believe in partnering with AHCCCS in relevant project meetings and activities. Proactive participation helps support our team’s understanding of the project’s progress, resources, budget, schedules, workflow, and reporting, allowing us to evaluate these areas. This understanding enables us to identify areas of focus that might require additional research and fact-finding activities. To support our “no surprises” approach to IV&V methodology, we will validate our observations and findings with AHCCCS. Using the information gathered throughout our review of project meetings, processes,

procedures, and deliverables, we will synthesize observations, findings, and recommendations into a clear and concise report.

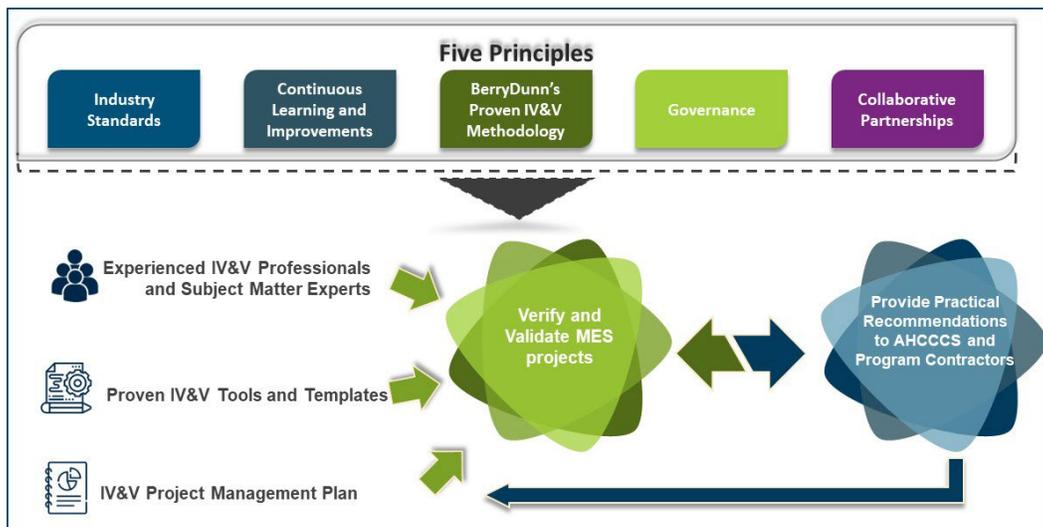
#### Step 4 – Report

The BerryDunn IV&V team is committed to supporting AHCCCS in achieving successful project outcomes through independent monitoring and reporting. Our team will use our knowledge of successful project implementation to verify that reporting provides adequate oversight of the project. We are accustomed to producing a range of client deliverables—from IV&V checklists, status reports, and risk assessments, to certification progress reports and executive briefings—as well as reporting deliverable findings.

#### Approach

Our IV&V approach is a cornerstone component of BerryDunn’s IV&V framework. In Figure 2, we have illustrated the BerryDunn IV&V framework and its five principles—a shared understanding of industry standards; continuous learning and application of process improvements; BerryDunn’s proven IV&V methodology; a disciplined execution of governance guidelines; and healthy, collaborative partnerships with AHCCCS and other project stakeholders.

**Figure 2: Five Principles to BerryDunn’s IV&V Approach**



IV&V activities are designed to offer timely insights into the status of each project and are integrated and conducted throughout all phases. BerryDunn’s IV&V approach emphasizes project success; therefore, all IV&V concerns are respectfully presented in such a way that adds value to the project.

## 1.2 — Project Responsibilities

As your independent partner for project success, we will offer guidance to meet the success criteria defined for all deliverables reviewed by our team, including all the project responsibilities and deliverables listed in 6.1 of the AHCCCS Final Task Order and the MES Modernization Roadmap. BerryDunn notes that there may need to be prioritization of reporting success criteria due to potential limitations with the size of the BerryDunn IV&V team and project scope.

### Schedule Management (6.1.1)

Schedule management is key to the success of any project. Our experienced IV&V staff are well versed in schedule management, the importance of hitting key milestones, and providing recommendations and insight should the schedule ever be at risk. With attention toward the integrated high-level timeline for the MES Modernization Roadmap and as it develops during the life of the project, our analysis will involve reviewing the project schedule, associated tasks essential to achieving the stated goals and objectives of each project, and the processes necessary to help ensure timely

completion of the project. Our BerryDunn team will monitor the project schedule, project status, and real or potential delays in tasks on a recurring basis throughout the project. Our team will develop and discuss strategies with AHCCCS to get the schedule back on track to meet the key project milestone dates. This includes analyzing, if appropriate, that project team members have been assigned to each task, scheduled duration of tasks are appropriate, and how the project team is hitting key milestones, including planned start and end dates, internal review dates, and deliverables.

Our team also understands this approach may require fluidity and flexibility based on the following assumptions and constraints:

- The proposed project schedule might change based on the actual project start date.
- Additional clarity will be gained as the project unfolds, information is gathered, activities are completed, and deliverables are created, providing additional details to expand upon tasks in the project schedule (e.g., AHCCCS procurement standards and availability of resources).

### **Resource Management (6.1.2)**

The allocation of resources is essential for achieving the greatest value for your project. Our BerryDunn team will partner closely with AHCCCS in monitoring slippages in staffing metrics across the project, utilizing resource models and best practices to support initiatives focused on improving interoperability and sustainability of AHCCCS technology solutions. As one of the key risks in the MES Modernization Roadmap, we understand the challenges of mobilizing your state experts into a project, while they also complete their normal daily tasks for AHCCCS. BerryDunn recommends the phased approach to help ensure staff is in place at the right times within the project. Estimation of resources as a tool by the project team assists in planning the staff needed to fulfill the contract during the different phases of the program. BerryDunn makes the following assumption regarding resource management:

- AHCCCS resources will be available to provide the input required to complete project tasks and deliverables (e.g., participate in strategic planning and requirements sessions, provide existing fiscal agent and MMIS documentation). Delays in sending requested information, availability to participate in meetings, review of deliverables, and decision-making might cause delays in the ability of BerryDunn to perform its tasks and submit deliverables as defined in this proposal.

### **Scope and Requirements Management (6.1.3)**

BerryDunn follows the guidelines prescribed by Centers for Medicare & Medicaid Services (CMS) for every IV&V engagement, including prioritizing, and monitoring current federal regulations as outlined in the Medicaid Enterprise Certification Toolkit (MECT/MECL), and current issuances for Streamlined Modular Certification (SMC). BerryDunn is intentional in our approach to monitoring CMS announcements regarding governance decisions and federal guidance, utilizing our long-standing professional relationship with CMS for clarification on new standards and compliance for current clients.

We are committed to providing AHCCCS with an independent and unbiased perspective of continuing the development, progress, integrity, and functionality of the project. One of the key differentiators that BerryDunn brings to this project is our independence from the IT systems contractor community. Our staff has many years of large-scale Medicaid and HHS system modernization experience, but we do not sell, develop, or provide staff augmentation services for software, hardware, or implementation services. Further, we do not have any preferred contractors and our name is not listed as partners, affiliates, or sponsors of any software. This allows us to provide truly independent verification and validation services for AHCCCS and CMS, which can help both entities rest assured the BerryDunn team will work in the best interests of AHCCCS—and the Arizona residents who benefit from the services and support provided by AHCCCS.

The scope of our IV&V services includes:

- Providing insight and sharing experience on the RFP development and procurement processes based on marketplace experience.
- Analyzing the project schedule, including assessing resource allocation and task dependencies, as well as monitoring scope, schedule, quality, resource management, and risk and issue management.
- Assessing the completeness and sufficiency of test planning documents and test execution for validating and verifying requirements are in scope, external and internal interfaces are functional, and other objectives outlined in the MES Modernization Roadmap.
- Reviewing AHCCCS key performance indicators (KPIs) to validate data queries and sources, verify query results, and confirm KPI calculations.
- Reviewing Medicaid Information Technology Architecture (MITA) State Self-Assessments (SS-A) and providing reviews and feedback on SS-A training materials.

### Technical Solution Management (6.1.4)

BerryDunn will include technical and operationally-focused testing impacts in our IV&V Progress, Risk, and Issue Reports for AHCCCS and CMS, including our assessments, risks, issues, and corresponding recommendations. Through open lines of communication with AHCCCS stakeholders, we will establish reporting metrics that provide insight into progress and overall project health for AHCCCS. This will result in a unified partnership between IV&V and AHCCCS, CMS, various module vendors, consulting firms, and stakeholders. Our main objective is to help ensure the AHCCCS project balances functionality and technical constraints in accordance with the MES Modernization Roadmap.

### Data Management/Migration/Conversion (6.1.5)

Data management is a crucial first step to employing effective data analysis, which leads to important insights into the effectiveness and efficiency of the Medicaid Enterprise. The task of data management when modernizing a system becomes more complex when the data of origin is coming from a system that is antiquated or has significant operational issues/defects. BerryDunn's independent assessment of data management process, procedures, and database design and operation can give the State a trusted partner in achieving its data management goals.

BerryDunn will assess activities and procedures surrounding data management, migration, and data conversion from legacy systems to help ensure stabilization and standardized interoperable systems. This includes CMS certification-required artifacts, such as concepts of operations, data and technical management strategies, privacy impact assessments (PIA), security plans, standardized electronic data storage, database and system design, and communicating how supporting data is improving health outcomes to meet AHCCCS's strategic goals.

BerryDunn's IV&V team will verify procedures are in place for reviewing the converted data for completeness and accuracy and monitor that data clean-up is being performed, as required. A sample of previous BerryDunn assessments include:

- **Data structure** – What is the current data structure?
- **Data type** – What type of data is being converted?
- **Data filters** – Is all data being converted? Only some of the overall data? Only data within a defined time frame? Are there legal considerations?
- **Down time requirements** – Can data only be converted during certain times of the day, such as during regular maintenance windows?
- **Frequency of managing, monitoring, and reporting** – What frequency needs to be maintained through the data conversions effort to maintain operations?

We can also coordinate and facilitate discussions between Arizona and Medicaid agencies in other states to exchange information on vendor modules, CMS certification, and health plan management.

### Quality Assurance (QA), Testing, Defect Resolution (6.1.6)

We view ourselves as stakeholders in the success of the AHCCCS’s projects and understand the potential business impacts when projects face quality issues. We have found that providing effective assessment and QA services take more than knowledge of best practices, technical experience, and subject matter expertise. It requires us to establish credibility early, exercise tact, and model professionalism to build and maintain the trust of our client and contractor leadership and staff.

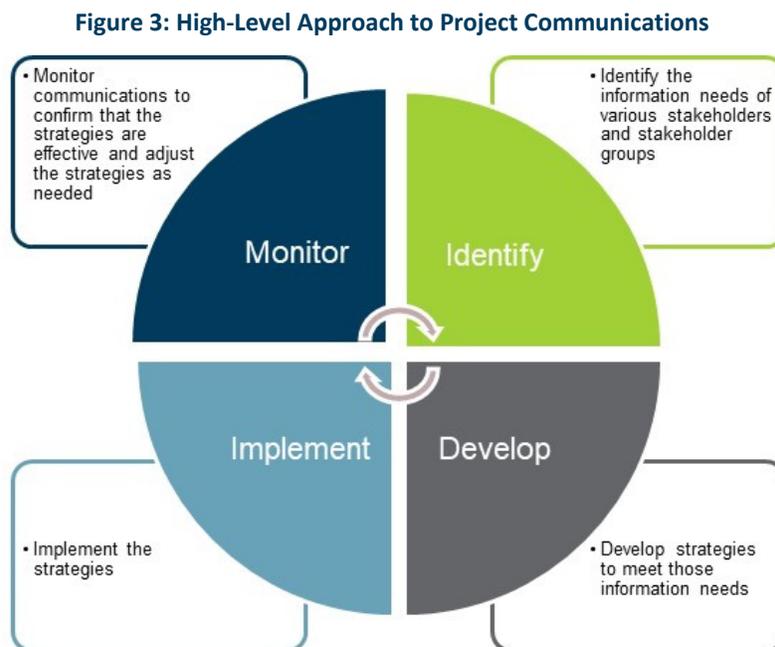
We will actively communicate evolving assessments and recommendations regarding QA, business processes, testing efficiency, and defect tracking, while simultaneously observing AHCCCS responses and activities to enhance project success. As we monitor QA, testing, and defect resolution in our deliverable reports, BerryDunn’s record of credibility and accuracy will also support AHCCCS modernization needs. We understand the MES Modernization Roadmap’s organizational challenges concerning data accessibility and will have a keen eye toward this as your IV&V vendor.

### Project Governance & Communications (6.1.7)

At BerryDunn, creating a solid, collaborative working partnership with AHCCCS, your assigned MES Program Manager as outlined in the MES Modernization Roadmap, Enterprise Project Management Office (EPMO), CMS, and project vendors will be a primary goal. Throughout our partnership with AHCCCS, BerryDunn will mindfully analyze project governance by evaluating framework, functions, resources, and processes guiding project activities. You can anticipate we will actively communicate evolving assessments and recommendations while simultaneously observing AHCCCS activities as your established governance structures and strategic primary plans take shape in preparation for your new systems integration platform.

As recommended in the PMBOK® Guide, our IV&V Management Plan will document our communication approach and processes—including those to AHCCCS and any project contractors. Our objective is to facilitate the critical links among people, ideas, and information necessary for project success.

Please see Figure 3 for a depiction of our high-level approach to supporting and providing effective project communications.



### Financial Management (6.1.8)

BerryDunn maintains a solid reputation for delivering outcomes and efficiencies when researching and providing recommendations on MES architectures and their financial impacts. Additionally, BerryDunn is equipped to assess budgeting as it aligns with the project schedule. We analyze project management and scheduling artifacts with the end in mind—i.e., timely completion of the projects that adhere to federal funding guidelines and alignment with vendor contracted requirements.

As part of our project management process, we will provide status reports assessing the project's health. These components will include assessments and recommendations for Advanced Planning Documents (APDs), schedule, scope, resources, procurements, deliverables, and other data in preparing and submitting documentation for funding the MES Modernization Roadmap initiatives. We will evaluate each phase of the project utilizing a Work Breakdown Structure (WBS) approach for all the Medicaid enterprise improvement projects being undertaken by AHCCCS. By using the WBS approach and communicating our evaluation of each project phase, we will help ensure each phase can be accomplished with the appropriated funds and that the project (phase) supports the enterprise IT strategy.

The WBS approach sequences project activities in their logical order, identifies and addresses dependencies, estimates resources, resource dependencies, and durations. Our team will review the project schedule critical path and dependencies and evaluate how delays could impact project deadlines and funding. Effective WBS coordination will bring AHCCCS's and contractor's tasks into alignment and will advance the effectiveness of our collective efforts.

### Change Issues and Risk Management (6.1.9)

Risk and issue management is an ongoing activity that begins at the project onset and occurs throughout the life of the project, and we have familiarized ourselves with the initial key risks outlined in the MES Modernization Roadmap. BerryDunn will manage the risks, issues, and opportunities for this project using our customized IV&V Risk and Issue Management Tool. This tool allows us to keep historical information about the findings, risks, and issues we identify over the life of the project. Knowing how findings can change over time, we designed the tool to allow an entry to be easily downgraded from a finding to a risk or issue without losing prior information or re-entry. For reporting purposes, the tool can customize reports and allow flexibility to select the most recent update to an item or to pull the entire history. Finally, the tool allows us to **track action on findings, risks, and issues**.

BerryDunn leverages the PMBOK® Project Risk Management framework from the Project Management Institute® (PMI®) for the management and control of risks and issues. Our IV&V team will focus on identifying enterprise risks—including business/programmatic, operational, technical, schedule, and organizational risks—**before** they become issues.

We will use a proactive issue and risk management approach that incorporates a **"no surprises" policy**. We will document and communicate new high-priority issues and risks to AHCCCS as we identify them; we will not wait until the production of the next status report to communicate high-priority issues and risks. BerryDunn's primary mission is to leverage our existing IV&V experience in the identification and resolution of a range of risks and issues and avoid negative impacts on their respective projects.

We will work as a partner with the AHCCCS team by providing recommendations on ways to mitigate threats and realize opportunities. The following definitions will be used during the management of risks and issues:

**Risk:** An uncertain event or condition that, if it occurs, may cause the project to be unsuccessful or less than successful in meeting objectives. Risks are events or conditions that have not yet occurred but may occur in the future. For example, availability of project resources is often identified as a project risk. The risk's impact may be positive or negative. A risk can be accepted, deferred, or mitigated.

**Issue:** An issue is an event or condition that has already occurred and requires immediate action to minimize a negative effect on a project objective. Risks may evolve into issues if not properly addressed. If left unresolved, an issue will negatively impact project scope, schedule, budget, or quality.

AHCCCS can be confident BerryDunn will track the MES Modernization Roadmap risks related to roadmap ownership, operation of model integration, service maturity and governance, funding, and State staffing levels and expertise, along with additional risks and issues the project may experience. AHCCCS can be confident that BerryDunn’s IV&V team, as your IV&V partner, will provide recommendations on ways to mitigate threats and realize opportunities.

**Documentation & Deliverables Management (6.1.10)**

BerryDunn has the tools and experience to support deliverable review for AHCCCS. We can use our internally developed deliverable review checklists to help AHCCCS’s project team, project leadership, and solution vendors understand the criteria against deliverables. If decided that BerryDunn will complete deliverable reviews, the deliverable review checklists can be reviewed prior to the commencement of each deliverable review cycle to verify that they align with the most recent contract, state, and federal regulations and guidance, and industry standards and best practices.

As project deliverables are being developed, our IV&V team can track them throughout their development and review cycle in preparation for the review process. When development is completed, our IV&V team can review them based on the agreed-upon acceptance criteria, including requirements, federal regulations, practice guides, existing checklists, and vendor proposal commitments. When agreed-upon acceptance criteria have not been previously identified, we leverage criteria such as industry standards and federal and state regulations, along with our knowledge obtained from meetings—such as requirements design sessions—in our review.

BerryDunn’s IV&V team also has a custom-developed Deliverable Review Comment Log to document observations, defects, and comments related to client and vendor deliverables. The log includes acceptance criteria and links the comments to the acceptance criteria and allows for an interactive process by providing space for AHCCCS or the solution vendor to respond to each comment.

Table 1 provides an example of the review criteria BerryDunn utilizes to help ensure quality reviews. When we review documents, comments are organized in the Deliverable Review Comment Log and assigned a review criteria ID to provide clarity and continuity to our reviews. Once the review of the deliverable is completed, our team will submit our deliverable review table to AHCCCS and will also input the reviewer’s comments directly into the deliverable for collaboration with AHCCCS, vendors, and stakeholders.

**Table 1: QA Area Review Criteria**

ID	Review Criteria
Q1.1	<b>Clarity</b> – The deliverable content is clearly stated, and misinterpretation is minimized.
Q1.2	<b>Completeness</b> <ul style="list-style-type: none"> <li>• Based on the project status, system development life cycle (SDLC) phase, and/or project milestone, the deliverable fulfills applicable requirements as specified in the agreed-upon outline or CMS template(s), with no tasks or sections missing or incomplete, including appendices.</li> <li>• If an outline or template section is omitted or not applicable, an explanation is provided in the deliverable. (A complete response must include more than “not applicable” or “N/A.”)</li> <li>• The deliverable contains a level of detail that is reflective of the version and the project phase/milestone.</li> <li>• The deliverable is in alignment with service-level agreements. The deliverable aligns with CMS critical success factors</li> </ul>

ID	Review Criteria
Q1.3	<b>Consistency</b> – The content contained in the deliverable is consistent within the document, with previously submitted versions of the same deliverable, with predecessor documents, and across other related documents.
Q1.4	<b>Traceability</b> – Within each deliverable, tracing of requirements occurs throughout each SDLC phase and aligns with the MITA Roadmap and MITA goals.
Q1.5	<b>Timeliness</b> – AHCCCS/the Contractor submitted the deliverable on time based on the due date established by AHCCCS, including revisions in accordance with the approved deliverable review process.

Our deliverable reviews can provide the AHCCCS project team and leadership with clear, concise, and—most importantly—actionable comments. The purpose of each comment is to provide AHCCCS and its vendor partners with a clear explanation of the deficiency and a defined measure for accepting the correction. In addition, each comment is ranked as “critical,” “major,” or “minor.” Critical comments are material deficiencies that must be addressed for the deliverable to be approved. Major comments could suggest disruption is likely and a change in approach required. Minor comments are typically cosmetic in nature and should be fixed prior to finalizing the document. Left unaddressed, minor comments will not likely increase project risk or impact system performance.

Our review would result in a recommendation to accept or reject a deliverable, supported by the findings contained in the Deliverable Review Comment Log. If there are significant gaps between the work product delivered by the solution vendor and the expectations of AHCCCS, the BerryDunn IV&V team may recommend a real-time collaborative issue-resolution approach. Using this approach, our team may schedule live review sessions (via projection of the document) and walk through findings with the entity that submitted the deliverable while the entity makes the necessary updates.

### BerryDunn Deliverables

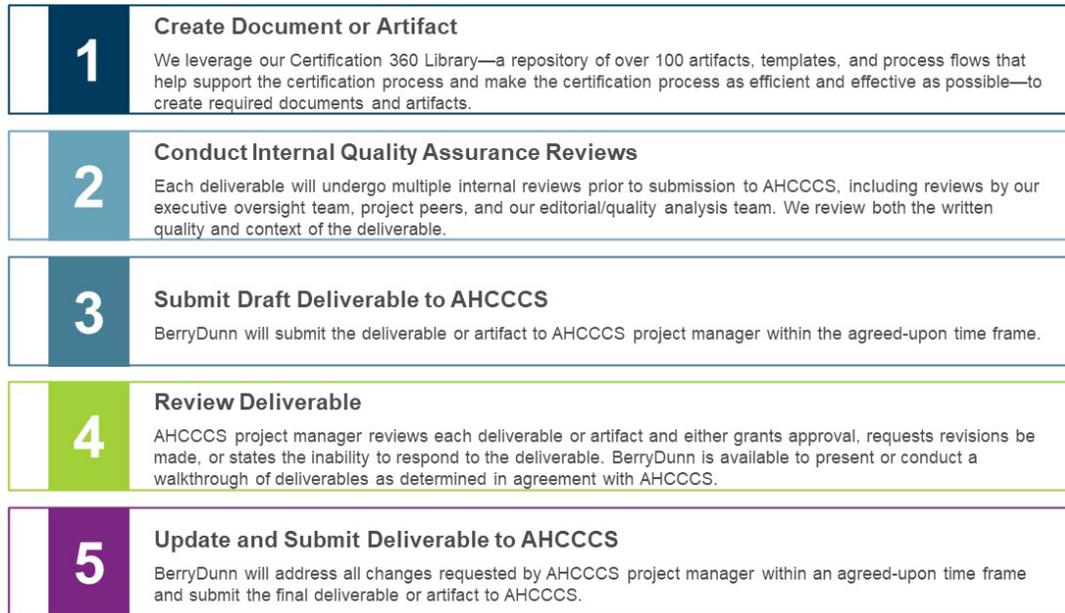
BerryDunn will develop initial outlines of each deliverable derived from the Final Task Order, and the MES Modernization Roadmap for AHCCCS review, starting from our repository of IV&V reports and project management templates. We will review these templates with AHCCCS and make updates to meet specific reporting and information throughout the MES modernization life cycle.

Our team will use AHCCCS’s SharePoint site or a BerryDunn SharePoint project site, whichever AHCCCS prefers, to manage our IV&V services documentation and work products; record the life cycle of all certification reviews; record project issues, risks, decisions, and action items; and promote team collaboration throughout the life of the project.

To keep IV&V tasks and deliverables on schedule with quality measures to meet or exceed AHCCCS’s expectations, BerryDunn has established QA guidelines that are shared among our team members and revisited often. Our IV&V process builds in time for quality checks so that the deliverables we produce are carefully reviewed prior to delivery to AHCCCS.

In Figure 4 we have detailed the QA guidelines that will apply to the preparation, submission, review, and approval of IV&V project deliverables:

**Figure 4: BerryDunn QA Guidelines**



Throughout the project, in support of the deliverables outlines in Attachment A of the Final Task Order, including Case Management, Hearing and Grievance, Refactoring of PMMIS/HPMMIS, and other optional services, we will prepare the following IV&V report:

- Quarterly Reports:** IV&V will deliver four quarterly assessment reports on the fifteenth of each month following the end of a quarter. Each report will detail the project’s strengths, gaps, and potential lessons learned of project areas over a three-month period. Quarterly reports may include actionable IV&V recommendations for each area evaluation for customer consideration to adopt or accept the identified risk. Additionally, the IV&V team will hold a quarterly meeting with AHCCCS, and other attendees as identified by AHCCCS, to present findings from the quarterly assessment report. During this meeting, IV&V will present the findings with the aid of a PowerPoint slide presentation.

Additionally, in other states, BerryDunn IV&V teams have created a monthly IV&V report. These reports include an analysis of the previous month’s progress, risks and issues, and a summary of project status reports. BerryDunn has found maintaining a monthly report provides frequent analysis, up-to-date monitoring of resource allocation and task dependencies, as well as updates on scope, schedule, quality, resource management, and risk and issue management.

**Security Management 6.1.11**

As AHCCCS refactors PMMIS/HPMMIS, your BerryDunn partners will observe and assess user and application security and privacy policies, security rights and role access plans, and technical designs, are updated and modified for enterprise security. We can also validate security administration for networks and platforms to help mitigate potential risks.

**Training, Go-Live & Post Implementation (6.1.12)**

As your IV&V team, we can partner with AHCCCS in assessing your process-focused communications and training and confirming AHCCCS can maximize the positive impact of coming changes. As part of go-live preparation, BerryDunn can also verify knowledge transfer is in place for maintenance and operation of a new system. During the post implementation phase on other IV&V projects, BerryDunn often provides project leadership summary report of completed tasks/work, outstanding risks, lessons learned, and potential opportunities for your consideration.

### **Case Management (6.1.13)**

BerryDunn brings decades of experience in assessing and advising clients procuring new case management systems across multiple Medicaid and behavior health divisions as featured in the AHCCCS MES Modernization Roadmap. We understand the benefits of sharing information across domains for efficient and accurate data management, and the importance of detailed evaluations and recommendations when reviewing project design and integration of modern case management technology and standards. AHCCCS can be assured that as your IV&V vendor, BerryDunn will accurately analyze the new case management system and suggest actionable recommendations should the need arise.

### **Hearing and Grievance (6.1.14)**

BerryDunn is familiar with the Arizona article that establishes the grievance, appeal, and State Fair Hearing requirements for a person enrolled with the AHCCCS contractor. AHCCCS can be confident our client experience in transitioning states from legacy systems with numerous manual processing workarounds to an integrated system with online portals and applications will result in positive project outcomes.

### **Refactor Prepaid Medicaid Management Information System (PMMIS)/Hawaii Prepaid Medicaid Management Information System (HPMMIS) (6.1.15)**

As AHCCCS refactors PMMIS and implements ServiceNow, we will bring our experience of utilizing an agile approach to our IV&V observations and assessments in alignment with the MES Modernization Roadmap. This includes assessing alignment of CMS guidelines and changes as you build and maintain new technology platforms, system performance reporting, and recommendations for delivering outcomes to maintain federal funding.

### **Strategy, Certification and Reporting to CMS (6.1.15 and 6.7)**

BerryDunn has extensive experience supporting certification efforts in West Virginia, Ohio, and Puerto Rico. This experience includes helping our clients transition from one CMS certification approach to another. Most recently, BerryDunn supported West Virginia, Ohio, and Puerto Rico through Outcomes Based Certification (OBC) pilots.

Given the importance of CMS certification for AHCCCS to receive 90% federal funding for MES projects, a central part of BerryDunn's IV&V role is to review CMS certification evidence packets and provide guidance to AHCCCS to help ensure a successful certification process. To support certification, our team utilizes a BerryDunn created certification library, which contains nearly 100 artifacts, templates, and process flows that help support the certification process and make the certification process as efficient and effective as possible.

In April 2022, CMS issued the SMC State Medicaid Director Letter (SMDL). The SMC process sunsets the MECT and Medicaid Eligibility and Enrollment Toolkit (MEET) and enhances CMS and states' focus on outcomes. The intention of an SMC approach is to provide consistency and accountability during the certification process. This includes following CMS guidance for CMS-required outcomes based on statutory and regulatory requirements; State-specific outcomes that are measurable, achievable, and structured with short-term goals and measurable metrics to track evidence and successes; and meeting the seven certification artifact requirements.

The focus on outcomes means SMC is a shift away from a technical-focused certification to a business outcome-focused approach. Rethinking certification in terms of business outcomes will require agencies to engage business and operations units at the earliest possible point of the project development process to define the program goals and define what a successful implementation looks like.

AHCCCS can be confident in BerryDunn's ability to support the smooth transition from the former certification approaches to SMC based on our experience working on SMC pilots with our clients and CMS. The BerryDunn core IV&V team will also evaluate and make recommendations for AHCCCS artifacts that will be required for MMIS certification milestone reviews. With 35 years of practical, hands-on application of IV&V competencies, BerryDunn will provide AHCCCS with a reliable, consistent, communicative, and actionable partnership.

## 2 — Experience and Expertise

### 2.1 — IV&V, State Medicaid Technology, Similar Size and Complexity Projects

BerryDunn has over 35 years of IV&V experience. We have provided IV&V services to support the success of HHS agency system implementations in states such as Maine, Maryland, Massachusetts, Missouri, New Hampshire, Ohio, and West Virginia.

As the primary vendor supplying project management services to the West Virginia Department of Health and Human Resources (DHHR) since 2003, we have supported West Virginia with the completion of multiple MITA SS-As, its State Medicaid Health Information Technology Plan, and its State Health Information Technology Plan. We have also assisted West Virginia in completing feasibility studies and alternative option analyses for several solutions, including but not limited to, its MMIS, its HHS Integrated Eligibility System (IES), and its Asset Verification Solution. Furthermore, we have assisted them in the development of multiple project management plans that included procurement management strategies for each of the aforementioned MMIS and HHS solutions.

From 2016 to present, BerryDunn has served as the IV&V vendor for the Ohio Department of Medicaid (ODM) on its modular OMES project. Our contract includes IV&V and CMS certification services through the procurement, design, development and implementation (DDI), and initial operation of multiple modules. During this time, we have collaborated with CMS and the State on activities such as:

- Supporting an OBC pilot for the Electronic Visit Verification (EVV) implementation
- Providing oversight to ODM to help ensure compliance with CMS guidelines
- Performing CMS certification reviews and support based on the sunset MECT guidelines and current SMC
- Reviewing CMS certification required artifacts, including concepts of operations, data and technical management strategies, privacy impact assessment, security plan, earned value and velocity management, database design, and system design

From 2017 to present, BerryDunn has served as the Project Management Office (PMO) for Missouri Department of Social Services (DSS) as they implement their modular Business Intelligence Solution-Enterprise Data Warehouse (BIS-EDW) and Program Integrity (PI) solutions. During this time, we have collaborated with CMS and the State on activities such as:

- Serving as the central point for coordinating the certification milestone review schedule (R1, R2, and R3) for the two modules assigned to BerryDunn
- Helping ensure that all CMS-required project artifacts for each stage gate review have been developed and delivered to CMS ahead of the actual review
- Addressing CMS recommendation decisions after each milestone review, scheduling tasks in the project management plan, and prioritizing any corrective actions CMS expects to be reflected before the next milestone review
- Facilitating regular status reporting to federal partners to keep them informed of project achievements between stage gate reviews
- Managing CMS reviews from a relationship-based perspective, to which we leverage our existing relationships with CMS and our track record of success managing stakeholders

We will leverage our experience and knowledge gained through the certification efforts in West Virginia, Ohio, and Missouri, and provide the State with applicable familiarity and experience. Through this work, we have created an extensive knowledge library that includes detailed process flows, artifacts, and templates for the certification review process. The BerryDunn IV&V team will leverage this repository in our work with the State to support your team in navigating the certification effort required.

## 2.2 — Knowledge and Experience

BerryDunn brings more than 20 years of experience in providing IV&V services for enterprise IT applications and government health programs including:

- Missouri DSS – IV&V for Missouri Eligibility Determination and Enrollment System (MEDES) (July 2013 – Present) – Where we are providing IV&V services to support Missouri’s MEDES implementation. The BerryDunn team has reviewed and evaluated the SDLC methodology utilized by DSS and the solution vendor. The MEDES project follows a modified Agile SDLC. In addition, BerryDunn assesses software development processes to help ensure conformity to federal requirements under the Exchange Life Cycle (ELC). BerryDunn also conducts reviews of the MEDES project in preparation for CMS gate reviews.
- Ohio ODM – IV&V for modular MMIS (December 2016 – Present) – Where we are providing IV&V services, and our IV&V team is assisting Ohio with certification of its modular Medicaid enterprise procurement and implementation using MECT 2.3. This work includes completing Certification Milestone Reviews across all life cycle phases of the MECL – including MEC Checklist assessments, CMS Certification Required Artifact reviews, modular certification assessments, and MMIS IV&V Progress Reports. We have the distinction of supporting Ohio as the first state to undergo certification for an EVV system with an OBC approach in 2018 and now supporting the 2023 EVV re-procurement. IV&V worked in collaboration with ODM in 2023 to develop a recommendation tracker workflow and actively address the IV&V actionable recommendations each month following the IV&V deliverable. ODM, module vendor leads, and stakeholders provided feedback and ODM decisions, developed mitigation strategies or accepted IV&V identified risks.
- Ohio **Department of Administrative Services (DAS)** – Ohio Benefits Program IV&V Services (April 2021 – Present) – Where we are supporting Ohio in implementing an integrated eligibility application that is consumer-centric and easy to navigate, promotes care coordination, improves administrative efficiencies, and enhances the delivery of healthcare services that are specific to an individual’s needs. Our team provides independent observations and actionable recommendations on program management, processes, business, functional, and technical problem management, system integration, and key challenges, risks, and issues to Ohio Benefits Program leadership and stakeholders.

We understand that the perception is that IV&V contractors only focus on the threats to achieving project objectives. We believe, however, that in our role as an IV&V partner, we are also able to identify opportunities where the risk impact is desirable and where risk management is used to realize the potential opportunities. We also recognize that every state and every project is unique. We understand that the environment in which AHCCCS operates is dynamic. As a result, we view our experience and knowledge as a solid foundation to build upon and adapt to the changing project, organizational, and financial realities in AHCCCS.

## 2.3 — Experience of Proposed Staff

Our IV&V staffing approach has repeatedly proven to provide maximum value to our clients by offering deep IV&V and project management experience from our leads, specialized skills of subject matter experts (SMEs), and technical and administrative skills of supporting staff to bring AHCCCS the right resource for the right task at the right time throughout the project.

We are offering three key staff for our IV&V services: Bill Richardson as project principal, Buffy Cranford as project manager, and Taylor Phillips as senior IV&V consultant. We are also including a consultant to be named upon contract award and have included a representative resume to highlight the level of expertise and skill that we will bring to this position. Our proposed staff includes a pool of SMEs: Jim Strassenburgh, Carla Laughlin, and Divya Arulsamy. Should the need for additional expertise arise, BerryDunn has a Consulting Services Team of over 300 highly qualified experts that we can bring to our services. See resumes for all key staff and additional staff in Section 2.4.

## 2.4 — BerryDunn IV&V Team Resumes

### 2.4.1 — Key Staff



#### **Buffy Cranford, MA, PMP®, Prosci® Project Manager**

Buffy brings more than 20 years of professional experience in public and private sectors. Over the course of five years, she led integrated eligibility transitions and strategic implementations in Nebraska for Medicaid and Long-Term Care, client services call center development and management, and asset verification systems. For the past 11 years, she has specialized in knowledge management and streamlining of multiple federal DHS programs including Medicaid and Economic Assistance (SNAP, Child Welfare, LIHEAP). She has a proven track record for implementing processes, staffing models, and

knowledge management to deliver timely eligibility determinations. While in Nebraska, she transformed state-wide service delivery as a leader in Medicaid, and within two years, successfully restructured employment and training offices using new technology within the Department of Labor.

As a consultant, she specializes in independent verification and validation (IV&V), organizational change management (OCM), project management, knowledge management, communications, training, and documentation design and implementation. Competencies include federal Medicaid and labor programs, stakeholder assessment, quality assurance, project management, program management, RFP writing, communications, credibility building, and client management.

#### **Key Qualifications**

- ✓ As a PMP®, expertise in project management and planning for implementing integrated eligibility programs and procurements in Nebraska, Arkansas, and West Virginia
- ✓ 10+ years of oversight, coordination, and facilitation of OCM and operational readiness activities consistent with Prosci® Change Management Methodology
- ✓ 10+ years in partnering with human resources regarding staffing levels, union contracts, hiring, interviewing, recruiting and retention
- ✓ 15+ years analyzing data and trends and implementing strategies to increase staff performance metrics/efficiency, and increase client quality assurance service levels
- ✓ 15+ years of leading, managing, and coaching staff through transitions and new process implementation while maintaining retention and creating cross-functional teams
- ✓ 16+ years of providing OD opportunities and tools, and managing resource allocations
- ✓ 20+ years of managing contracts, deliverables, project communications, and public relations
- ✓ 20+ years of training approach planning, including job roles and responsibilities, business processes, measuring impacts and change resistance, and creating repositories of supporting materials

#### **Relevant Experience**

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

##### **Ohio Department of Medicaid (ODM) – Ohio Medicaid Enterprise System (OMES) IV&V Services (05/2022 to present)**

Buffy is a senior consultant in BerryDunn’s Medicaid Practice Group, currently supporting ODM on its modular Medicaid Enterprise System (MES) modernization effort in the roles of deputy project manager, program lead, and certification lead. She applies her vast Medicaid and system integration project management expertise when assessing and evaluating risks and issues and manages the submission of the monthly IV&V report to CMS.

##### **West Virginia Department of Health and Human Resources (DHHR) – People’s Access to Help (PATH) DDI Project Management (11/2019 to 02/2021)**

As a senior consultant, Buffy served as the OCM Lead on the West Virginia People’s Access to Help (WV PATH) project. She managed the identification, development, and implementation of organizational change management and operational readiness activities. This included updating and expanding the OCM Project Plan in alignment with the RFP, tracking and producing OCM deliverables,

providing status reports for OCM and Training responsibilities and tasks, and working in collaboration with the State of West Virginia to streamline communications.

West Virginia Bureau for Medical Services (BMS) – COVID-19 Contact Tracing and Testing Initiative (04/2020 to 09/2020)

She has also led the COVID-19 task tracking team and built strong relationships with State Bureaus by coordinating communications, escalating tasks, and monitoring the progress of tasks and adherence to Federal governance.

### **Cognosante/NTT Data (08/2018 to 11/2019)**

As a senior associate and organizational change manager, Buffy has served as the OCM Lead on numerous projects, primarily Medicaid and Economic Assistance eligibility and their associated programs, and the Arkansas Juvenile programs. She managed all aspects of Organizational Change Management for Medicaid Eligibility, based on requirements set forth in the RFP. This included collaborating with State and System Integrator teams in creating goals, timelines, deliverable expectation documents, and project status reports; serving as a track expert in design and JAD sessions of the new eligibility systems for Medicaid and Economic Assistance; and reviewing resolutions in finalizing OCM, training, communications, change impact, knowledge transfer, and roll-out plans.

### **State of Nebraska (04/2016 to 08/2018)**

As the administrator of the Eligibility and Enrollment Solution project team, Buffy managed multiple projects including the new Medicaid eligibility system, asset verification system, procurements, and contract management. She led all facets of organizational change management, communication, training, and documentation design and implementation, which included the following responsibilities:

- ✓ Write and update Communications, Training, and OCM plans, and align with contractual requirements.
- ✓ Guide and manage creation and approval of Training approach, the design of process and training manuals, virtual training, and ongoing support materials.
- ✓ Analyze Request for Proposals (RFPs) and contractual requirements to help ensure vendors deliver accurate design and functionality.
- ✓ Develop detailed project plans for each component of organizational changes, training, documentation development and communication approaches, by identifying sequential activities.

She also served as the Information Systems and Technology Privacy Officer, overseeing security of Medicaid software and hardware. This included creating and updating the Privacy Office Policy and Program Manual to create a prescriptive set of processes and procedures aligning with Federal and State of Nebraska Information Technology security policy and standards.

### **ACCESS Nebraska Lincoln Customer Service Center (06/2013 to 04/2016)**

Buffy oversaw the direction and organization of the Medicaid and Long-Term Care services. She performed organizational change management analysis, reorganized the Lincoln Customer Service Center, assigned workers into skill sets, minimized phone queues, and reduced call wait times from forty-five minutes to five minutes or under for over two years. She created and implemented yearly strategic plans for both Customer Service Centers by examining resources, goals and objectives of the agency; updated and monitored performance metrics and developed dashboard monitoring strategies to help ensure clients received efficient and accurate customer service; collected and analyzed data and trends for the Medicaid and Long-Term Care call centers, and implemented strategies to increase service levels; directed multifunctional programs, improved efficiency, and increased the monthly quality assurance accuracy percentage with an average of 97.5 to 98%; and reviewed interactive voice response systems to reduce phone queues and improve customer service, and served on a workgroup reviewing upgrades to the interactive voice response systems.

### **Nebraska Department of Labor (10/2011 to 06/2013)**

Buffy designed and implemented the Virtual Services Unit call center for improving the federally funded labor exchange by retaining and marketing to new and existing employers and adding and attracting skilled labor to the NEworks system. She designed an intense training program, including quality assurance guidelines and scripts, for new Workforce Coordinators, and conducted follow-up training.

Buffy also served as the program coordinator for the Wagner-Peyser Act, assisted in creating and communicating policy initiatives, procedures, and goals for Wagner-Peyser employees. She developed federal grant applications and corrective action plans; designed

an online training program and conducted weekly trainings for the NEworks online labor exchange system to assist in learning new technology; and assisted in designing the yearly federal incentive for enhancing the administrative delivery of employment and training activities in the Nebraska career centers, Workforce Regions, and surrounding communities.

**TerraScan Inc. (03/2007 to 01/2011)**

Buffy managed the Human Resources department, including overseeing employment, job postings, resume review, interviewing, hiring, maintaining sensitive documentation, and training of new and existing staff on policies and procedures.

Computer Services Inc. (11/2001 to 03/2007)

As a technical writer and application product specialist, Buffy managed online and hardcopy documentation for product releases and enhancements. She supervised work teams responsible for designing enhancements, programming, and testing banking software across the nation; conducted comprehensive testing of banking software; and designed help files and created articles for company announcements.

**MindVision Software (10/2000 to 11/2001)**

Buffy answered software and eSellerate technical support questions daily by email and phone. She edited the User's Guide for Installer VISE, conducted comprehensive testing of software and eSellerate web site, and performed on-site training of new software to Lincoln Stars administrators.

**Education and Certifications**

- MA, Management, Doane University
- BA, English, Communications, University of Nebraska
- Certified Project Management Professional® (PMP®)
- Certified Stable™ Master Chief
- Prosci® Certified Change Practitioner
- Lean Six Sigma Green Belt (LSSGB) Certification

**Reference 1**

<b>Name</b>	David Parker
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**Reference 2**

<b>Name</b>	Thomas Change
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## Taylor Phillips

### Senior IV&V Consultant

Taylor is a Project Manager and Senior Consultant in BerryDunn’s Medicaid Practice Group, focusing on Independent Verification and Validation (IV&V) services. In her current role on the Ohio Benefits IV&V engagement, Taylor is serving as the project manager. In this role, she provides leadership to staff on her team, serves as the lead contact for State staff and CMS, and manages the team’s budget and invoices. Previously, she was the deputy project manager for the OMES IV&V engagement where she also served as the certification lead. Through her work, Taylor has developed collaborative and trusted relationships with ODM and Department of Administrative Services (DAS) leadership and staff, as well as the Centers for Medicare & Medicaid Services (CMS) State Officer and numerous vendor staff. As a seasoned former legislative aide, she has a deep understanding of the Ohio state legislative landscape, including experience navigating the state and capital budgetary processes and analyzing legislative policy, particularly health and Medicaid policy. Taylor brings positive energy, and strong project management, communication, analytical, stakeholder engagement, and organizational skills to all her work. Taylor also plans to obtain her Project Management Professional (PMP) certification in the upcoming months.

### Key Qualifications

- ✓ 2+ years of IV&V experience
- ✓ Project Management experience
- ✓ Program and policy development and modeling
- ✓ Legislative analysis
- ✓ Stakeholder engagement and outreach
- ✓ Training

### Relevant Experience

#### BerryDunn (03/2021 to present)

##### **Department of Administrative Services (DAS) – Ohio Benefits Program IV&V Services (01/2023 to present).**

Taylor is the current project manager for the Ohio Benefits IV&V engagement. She manages a lean team of IV&V professionals, focusing on mentoring them and developing them professionally. She is a main contributor of the Monthly Progress Assessment Report and the Quarterly Assessment Summary. Additionally, she completes an in-depth review of both of those reports as well as the Monthly Status Report before submission to the client. Taylor also leads and develops the agenda for both the weekly meetings with the Ohio Benefits leadership team and the quarterly meeting with high-level key stakeholders, including leadership from DAS, ODM, and the Ohio Department of Jobs and Family Services (ODJFS). In addition to leading client work, Taylor executes project management duties including managing the engagement’s budget and creating and submitting invoices to the client.

##### **ODM – OMES IV&V Services (03/2021 to present).**

Taylor leads IV&V efforts with the SPBM project by collaborating with OMES stakeholders, observing client meetings, and reviewing project artifacts. She manages the development and submission of the monthly SPBM report and the quarterly SPBM and OMES reports that are submitted directly to CMS for their review. In addition, she leads the team’s certification efforts by overseeing all OMES module-specific certification work and contributing to BerryDunn’s internal certification focus group; and coordinates collecting signatures from agency project managers and submitting the Deliverable Acceptance Forms to the IV&V manager for accounting purposes.

##### **Ohio Women in Government (OWIG) (06/2017 to present)**

Taylor has held a number of positions with the organization Ohio Women in Government, including treasurer, membership chair, philanthropy chair, and member of steering committee. Through her work with OWIG, Taylor has planned and executed philanthropic, educational, and social events, worked with the OWIG executive team to chart the trajectory of the organization, and managed the nonprofit’s budget.

**Ohio Senate, Office of State Senator Nickie J. Antonio, Minority Whip-Elect (01/2019 to 04/2021)**

As senior legislative aide, Taylor successfully moved bipartisan, sound public policy through the legislative process, including applying strong communication, analytical and organizational skills to collaborating with interested parties, coordinating testimony and public hearing presentations, and crafting bill language. Taylor navigated the fast-paced budget process, applying her institutional knowledge of state government by monitoring and suggesting amendment proposals to improve the budget. She was responsible for researching and analyzing in-depth policy topics, skillfully clarifying issues and presenting them to the Senator, interested parties, and constituents. She coordinated with members of the press; authoring press releases, speeches, talking points, letters to the editor, and articles for local newspapers. Taylor assisted caucus policy advisors in overseeing committee work in healthcare, transportation, commerce finance, tax, and Medicaid policy; and managed the Senator’s office overseeing day to day operations and directly supervising the Legislative Aide, pages, and interns.

**Ohio House of Representatives, Office of State Senator Nickie J. Antonio (06/2017 to 01/2019)**

As legislative aide, Taylor assisted constituents in navigating state bureaucracies and interfaced with state agency liaisons, local governments, and congressional offices to solve complex problems including public assistance, benefit retention, and jobs and family services programs. She worked to introduce numerous pieces of legislation, many with bipartisan support, by collaborating with elected officials, lobbyists, and interested parties on researching and drafting legislation. Taylor wrote press releases, newsletters, and official correspondence; researched public policy issues and platforms. Additionally, she tracked moving legislation with attention to detail; performed critical policy analysis and planning work for the following committees: Health; Finance; Joint Medicaid Oversight; and Joint Legislative Ethics.

**Education and Certifications**

BA, Political Science, Ohio Northern University  
 Lean Six Sigma, Green Belt

**Reference 1**

<b>Name</b>	Felica Davis-Ray
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## 2.4.2 – Additional Staff



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

Bill is a principal in BerryDunn’s Medicaid Practice Group with over 20 years of experience providing project management for the human services enterprise, including both Integrated Eligibility Systems (IES) and Medicaid Management Information Systems (MMIS). His project management experience includes both technical experience as a programmer, as well as business and policy experience.

#### **Key Qualifications**

- ✓ Active modular MMIS experience in multiple states
- ✓ Direct experience with the CMS certification process
- ✓ Over 20 years of human services project experience
- ✓ Nearly a decade of IV&V experience
- ✓ Certified Project Management Professional®
- ✓ Prosci® Certified Change Practitioner

#### **Relevant Experience**

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

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

- ✓ *Missouri Medicaid Enterprise (MME) PMO Engagement (11/2017 to present).*  
Bill is serving as the project principal for the MME PMO project spanning multiple Missouri DSS divisions. Key activities include partnering with the MME to support the implementation of a program integrity solution along with business intelligence (BI) and enterprise data warehouse (EDW) solution along with supporting certification.
- ✓ *Missouri Eligibility Determination and Enrollment System (MEDES) IV&V Services (07/2013 to present).*  
Bill currently serves as the project principal for the MEDES IV&V engagement. As part of this project, BerryDunn is serving as an independent partner as Missouri implements a new integrated eligibility system. This work has included an initial implementation, transition to a new systems vendor, and transition to a third vendor for maintenance and operations. BerryDunn is providing proactive risk and issue identification and management.

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

###### **ODM –OMES IV&V Services (12/2016 to present).**

Bill currently serves as the project principal for the OMES IV&V engagement. BerryDunn is helping ODM ensure a modular approach and implementation along with governance that will work for Ohioans and support ODM’s modular certification process, including applying to OBC approach.

###### **Department of Administrative Services (DAS) – Ohio Benefits Program IV&V Services (04/2021 to present).**

Bill is the current project principal for the Ohio Benefits IV&V engagement. BerryDunn has been supporting DAS as it leads this multiagency program through operations. BerryDunn has supported DAS and its partner agencies as they work to provide an eligibility system that benefits the systems of Ohio and works in partnership with CMS.

###### **Puerto Rico Medicaid Program (PRMP) – Enterprise Objective Monitoring and Control (EOMC) Services (07/2019 to present).**

Bill serves as the engagement principal in BerryDunn’s partnership with PRMP as they transform their Medicaid enterprise. BerryDunn’s EOMC services include helping Puerto Rico establish a Program Management Office, complete strategic planning for their enterprise while documenting it in an MITA SS-A update, improve the management of their contracts and advanced planned documents (APDs), complete certification of multiple modules such as their IES, and transition aspects of operations from system vendor staff to the PRMP staff.

**New Mexico Human Services Division – Health and Human Services (HHS) 2020 Project Support (08/2016 to 06/2018).**

BerryDunn provided support to the HHS 2020 project—New Mexico’s modular MMIS replacement project. As the engagement manager, Bill brought his MMIS experience in support of project management and system architecture to BerryDunn’s Team.

**Hawai’i Department of Human Services Med-QUEST Division (MQD) – Organizational and Business Process Redesign (07/2017 to 12/2017).**

Bill served in the role of program director for the eligibility business process redesign effort for the customer-facing sections of Hawai’i’s MQD. His work included overseeing the work performed by BerryDunn’s Team, reviewing and approving all deliverables, being involved in key meetings with the MQD and State leadership, and helping to ensure the full commitment of BerryDunn to the engagement. Phase Two of the project was recently completed, which culminated in a findings and recommendations report that included recommendations for organizational transformation of their eligibility offices and call centers.

**West Virginia Children’s Health Insurance Program (WVCHIP) – Assessment of ACA Compliance and Transition Project Management Support (10/2013 to 08/2015).**

Bill served as engagement manager overseeing the BerryDunn Team evaluating needs associated with WVCHIP to help bring it into compliance with ACA requirements. This project included transitioning WVCHIP from its previous Third-Party Administrator to an MMIS.

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

- ✓ *ICD-10 Transition Planning and Implementation (03/2013 to 06/2015).*  
Bill helped in the initiation of the BMS’ ICD-10 compliance project, drafting the I-APD and developing the project schedule. Bill served as the project manager at the start of the project and continued to act as a project SME.
- ✓ *Data Warehouse / Decision Support System (DW/DSS) Project Management (02/2012 to 12/2014).*  
Bill provided project management for the evaluation of proposals in response to BMS’ DW/DSS RFP. This included developing evaluation packets for the evaluation committee.
- ✓ *PPACA Planning, Analysis, and Implementation Support (04/2011 to 12/2013).*  
Bill served as the project manager for the PPACA Planning Project, which gave shape to the ambiguous requirements of the ACA and provided project management of projects that needed to come into compliance with the ACA, such as enhanced payments for primary care providers and hospital-based presumptive eligibility.

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

**West Virginia Department of Health and Human Resources (DHS) – Eligibility and Enrollment Project Support Services (04/2013 to 04/2014).**

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

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

**ACS Health Enterprise Program**

As a systems delivery manager, Bill provided Team leadership and implementation management for internal and client facing phases of the development and deployment of the ACS Health Enterprise system. In this role, he oversaw Teams of business analysts, testers, and developers; directed the creation of an automation testing process to expedite testing of claim exceptions and reduce costs and risk; proactively identified risks and developed plans to mitigate risk and loss; led efforts to develop and document standard and repeatable processes for use across the organization; and implemented a risk-based testing methodology to manage schedule constraints while maintaining deployment quality.

**State of North Dakota’s Medicaid Management Information System Project**

As a project manager and Team lead, Bill was responsible for the business design of the State of North Dakota’s largest-ever IT project. He developed and adapted processes to overcome challenges of deployment of the system under a new methodology; managed scope expectations by focusing on minimizing enhancements to the system; managed the creation of use cases and design artifacts; led the development of North Dakota’s requirements analysis document for all business functionality related to healthcare

claims adjudication and payment; led the alignment of the North Dakota deployment with the MITA Framework; and provided weekly maintenance of multiple work plans.

#### **State of North Carolina LEADS Project**

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

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

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

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

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

### **Education and Certifications**

Master of Healthcare Administration, University of Minnesota, School of Public Health

BS, Business, University of Minnesota, Carlson School of Management (Major: Management Information Systems, Minor: Political Science)

ITIL – Foundation Certified in IT Service Management

Certified Project Management Professional®, Project Management Institute®

Prosci® Certified Change Practitioner

### **Publications and Presentations**

How to Create a Work Breakdown Structure (WBS), Presentation for Minnesota Government IT Symposium, 12/10/2014

## Consultant

Our consultant works in BerryDunn's Medicaid Practice Group. They bring more than five years of experience working with state-level agencies, including work in managing grant activities, coordinating community engagement, leading professional development training, and researching policy.

## Relevant Experience

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

Our consultant works with BerryDunn's Medicaid Practice Group.

### **Ohio Department of Education (06/2019 to 08/2020)**

They served as a family and children community administrator for the Office of Whole Child Supports. In this role, they led the statewide implementation of the federal provisions in the Every Student Succeeds Act for the educational stability of youth in foster care. They also coordinated family and community engagement policies, programs, initiatives, and grant activities; served as a liaison to the Ohio Statewide Family Engagement Center at The Ohio State University; and wrote policy memos, guidance documents, resource guides, and conceptual frameworks to support education policy and program implementation in Ohio's local school districts.

### **KIPP: Columbus (08/2016 to 06/2019)**

As a lead kindergarten and first grade teacher, they strategically developing instruction to increase student achievement. This included analyzing student academic data on a weekly basis and developing lesson plans that differentiated student instruction in literacy, math, and personalized learning, as well as conducting regular family engagement activities including home visiting, parent-teacher conferences, and family meetings.

### **Office of State Senator Peggy Lehner (06/2017 to 08/2017)**

As an education policy fellow through the Leadership for Educational Equity, Summer Policy and Advocacy Fellowship, they synthesized academic research into policy memos that informed the Senator of developments in impending education legislation. They researched Positive Behavior Interventions and Supports (PBIS) and other effective school-based behavioral interventions; scheduled, planned for, and conducted 'interested party' meetings with advocates and state level representatives; and designed an informational survey using an online platform that was distributed to over 1,000 teachers and administrators statewide in order to drive policy-making decisions.

### **Chicago Public Schools (06/2014 to 06/2016)**

As an early childhood educator, they helped to design and implement a comprehensive kindergarten readiness assessment system, which was used to track student growth and plan for specialized instruction. They participated in a rigorous training program that combined management, curriculum development, and assessment practices.

### **US Department of Education (05/2013 to 08/2013)**

They served as an education intern, managing logistics of federal grant programs. They assisted in planning and staffing Department events, served as one of two lead interns in developing a social media campaign, and assisted the Deputy Director of Rural Education with communications initiatives.

## Education and Certifications

MA, Public Policy and Management, The Ohio State University, John Glenn College of Public Affairs

BA, Political Science, The Ohio State University, College of Social and Behavioral Sciences

BA, Public Affairs, The Ohio State University, John Glenn College of Public Affairs



## Jim Strassenburgh

### Subject Matter Expert

Jim is a senior consultant with BerryDunn's Consulting Services Team. He has over 30 years of IT experience and a rare combination of skills gained from working with large-scale systems architecture projects, including serving as an operations technical lead for critical financial infrastructure on Wall Street, and founding a software development company to build high availability and DevOps products. While at BerryDunn, Jim has focused on healthcare systems, working on several state Medicaid IV&V projects and also serves as trusted adviser for his BerryDunn clients.

## Key Qualifications

- ✓ 9 years of experience supporting the success of state HHS agencies
- ✓ Experience providing systems architecture/design support for eligibility systems including system architecture/design support, data governance, large-scale datacenter creation and migration, and data architecture in states such as Maryland, Massachusetts, and Missouri
- ✓ Over 6 years of IV&V experience helping clients achieve their project objectives in Maryland, Massachusetts, and Missouri
- ✓ Extensive technical knowledge in state and federal eligibility statutes, rules, governance, and processes (e.g., FDSH, MARS-E, National Institute of Standards and Technology, FISMA, HIPAA)
- ✓ Jim was the lead architect for a \$250M IT outsourcing project
- ✓ Jim possesses extensive technical knowledge including expertise in system architecture, and cloud-based systems
- ✓ Technical adviser for a breadth of software solutions, including eligibility system migration to Amazon Web Services, cloud-based systems, and varying technical applications

## Relevant Experience

### BerryDunn (02/2013 to present)

#### West Virginia Department of Health and Human Resources (10/2019 to present)

- ✓ *Enterprise Data Services and Data Source Program (01/2020 to present).*  
Jim is concentrating on data governance for this large initiative and serves as an integration point between the PATH program data services and enterprise data services.
- ✓ *People's Access to Help (PATH) DDI Project Management (10/2019 to present).*  
Jim is member of the State Program Management Office serving on the Document Review Team. As a team member, Jim reviews all program artifacts with concentration on operations, architecture, performance testing, and data governance components for the program.

#### Massachusetts HIX/IES Entities – IV&V Services (05/2014 to 09/2019).

Jim served as IV&V technical lead for Massachusetts' HIX/IES implementation, with responsibility for CMS formal and boundary testing; blueprint testing; review and validation of major vendor releases; architecture review and other technical content; and engaging with vendors, senior Commonwealth leadership, and architects.

#### Maryland Health Benefit Exchange – IV&V for Maryland's HBE Implementation (02/2013 to 04/2014).

As IV&V technical lead, Jim assessed technical aspects of Maryland's HIX/IES implementation, tracked progress, developed risks and issues, innovated traditional IV&V work by creating deep-dive sessions and architecture flows, supported CMS attestations (reports) and Blueprint certifications, served as technical liaison, and worked to build strong relations across various stakeholders and vendors.

#### Missouri Department of Social Services – Missouri Eligibility Determination and Enrollment System (MEDES) IV&V Services (05/2013 to 07/2013).

Jim conducted a systems architecture review of the MEDES reporting, including high-level infrastructure, data flows, and system artifacts. In addition, he reviewed IBM's systems architecture report, observed required testing activities, and provided feedback as part of the IV&V Monthly Report.

**MetroSource, Corp. (1995 to 2012)**

Jim founded this hybrid consulting and software development company, providing systems architecture, data center virtualization, and business continuity services, including development of systems infrastructure documentation for performance engineering environment for Paychex and an after-hours trading system for Japan to support a high-volume retail equity trading system. Jim also designed and implemented high-availability architecture for AT&T's internet service, WorldNet.

**Rochester Institute of Technology (01/2010 to 12/2011)**

Jim served as the enterprise project manager in building a shared-services computing model and the construction of a new green data center facility for one of the largest private universities in the country. In this role, he developed new service processes and chargeback models based on shared services; developed formal RFIs and RFPs; provided budgeting and financial modeling, including return-on-investment assessments; developed a disaster recovery solution; and assessed security infrastructure, including IPS/IDS, security compliance, and firewall.

**Xerox (05/2008 to 06/2009)**

As data center infrastructure architect for the Oracle Competency Center, Jim developed enterprise Service Oriented Architecture (SOA) platform using an Oracle SOA stack; assisted in deploying new enterprise provisioning, alarming, and ticketing services; and conducted a company-wide assessment of VMware infrastructure of Europe and North American data centers.

**NYFIX, Inc. (01/2000 to 07/2006)**

As vice president for Systems and Systems Architecture, Jim was responsible for all new project initiatives, core infrastructure technology, and systems level operations, including management of infrastructure operations, with responsibility for over 65% of all order flow volume to the New York Stock Exchange (NYSE); management of infrastructure security; Security Exchange Commission compliance; and management of multiple generations of data center technology change, including three data center migrations.

**Education and Certifications**

BA, Philosophy, St. Lawrence University



**Carla Laughlin, MBA, PMP®**  
**Subject Matter Expert**

Carla is a Certified Project Manager Professional® with over 22 total years of Medicaid experience and 17 years' experience in leadership of small and large development Teams, and mentoring staff. She brings a strong understanding and direct involvement in complete project life cycle from development of SOW through project initiation and implementation phases. Utilizing a development background, she enjoys being a hands-on leader, actively participating in approach and implementation discussions, using my experience to help the Team arrive at the best approach for

the solution and customer satisfaction.

### Key Qualifications

- ✓ 22 years of Medicaid experience
- ✓ 8 years project management experience
- ✓ Extensive experience with MMIS, IV&V, and implementation projects
- ✓ Certified Project Management Professional since 2015

### Relevant Experience

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

##### Missouri Department of Social Services – MEDES IV&V Services (06/2022 to present).

Carla is a senior consultant in BerryDunn's Medicaid practice group, serving as an IV&V consultant. Using her background from implementing module upgrades and working with vendors, she evaluates project progress, looking for risks and possible process improvements.

#### Infocrossing, a Wipro Company (1998 to 06/2022)

##### PMO Manager/Program Manager (10/2021 to 06/2022)

Carla had oversight of PMO group, including PMs, testers, business analysts, and PMO tool administrators. She developed proposals for many new opportunities, and prepared responses for several state MMIS related RFPs, as well as a Contract Management tool, used to automate communication and alerts at various milestones of each contract to improve visibility and contract compliance of the PMO Team.

##### Project Manager (2015 to 10/2021)

Carla served as a resource manager over other PMs and JIRA® Administrator, providing mentoring, assigning work, oversight of project health, and assisted with customer escalations. She facilitated multiple, concurrent projects' resourcing plans, project plans, technical direction, and risk analysis for small and large projects with Team sizes ranging from 4 to 35. She led projects to carve out portions of the legacy MMIS and establish data interfaces with vendors in support of module replacements, managed and coordinated third party vendor deliverables and contract compliance, participated in multiple disaster recovery tests for the MO HealthNet application, and evaluated, identified, and implemented process improvements such as consolidating all Teams to the same set of templates, developing, and delivering training materials for project manager's and customers.

##### Technical Supervisor (2005 to 2015)

Carla identified and managed risks, provided project status to customers, handled escalations and managed defects. She created project artifacts such as requirement and design plans, interface plans, test plans, and implementation plans at each phase for customer approval. She also sat on an Architect Board and reviewed Design Plans from other project teams.

##### Team Lead/Developer (1998 to 2005)

Carla performed technical reviews on documents and code and evaluated adequate testing to identify gaps and helped ensure processes were followed. She implemented initial HIPAA X12 4010 transactions into the MO HealthNet application by evaluating many of the guides to align with business needs and developed the translation tool to map the data internally and subsequently the 4010-5010 X12 remediation effort.

## **Education and Certification**

MBA, William Woods University

BS, Computer Science, SMSU

Certified Project Management Professional®



## Divya Arulsamy, MBA, PMP®, SMC, ITIL, LSSYB Subject Matter Expert

Divya is an information technology (IT) program delivery and change management leader with 25+ years of experience managing large complex transformation programs for State Medicaid Agencies (SMAs) and fortune clients. He possesses excellent understanding of State Medicaid modules, namely claims system; provider; pharmacy; decision support systems; financial management; system integration services; fraud, waste, and abuse; and business operations. He has successfully assisted multiple SMAs with large complex programs involving design, development, and implementation (DDI),

program and portfolio management, operations management and Centers for Medicare & Medicaid Services (CMS) Certification.

### Key Qualifications

- ✓ 15+ years of Health and Human Services (HHS) project and program management experience
- ✓ 5+ years of oversight on CMS Certification Process starting with MECT 2.3 through SMC
- ✓ Re-engineered a legacy MMIS to a multi-tier architecture and MITA compliant system
- ✓ Working experience on multiple MMIS platforms in collaboration with multiple SMAs
- ✓ 20+ years of system integration and consulting experience across multiple technology
- ✓ 25+ years of Project, Program and Portfolio management experience across multiple industries
- ✓ Certified Project Management Professional®, Scrum Master and Lean Six Sigma
- ✓ Practitioner knowledge and usage of industry standards, tools and processes

### Relevant Experience

#### BerryDunn (09/2017 to present)

##### **Missouri Department of Social Services – Missouri Medicaid Enterprise (MME) PMO Engagement (11/2017 to present).**

Divya is the Engagement and Project Manager for the MME PMO assisting the State in implementation of Program Integrity and Enterprise Data Warehouse (MMIS) modules. Divya established the PMO processes, templates and coached and mentored the state staff to oversee solution vendor Design, Development and Implementation (DDI) work. Additionally, Divya managed Schedule, Risk and Issues, Change, Gate reviews, Status review and Quality. In addition to DDI work, Divya also assisted in traceability, testing and certification.

During this time Divya also led a procurement assistance project for Electronic Visit Verification (EVV). As part of this project Divya led a Team to gather requirements, document business process and draft a Request for Proposal. Additionally, assisted in the Planning APD and budget projection for the RFP. Based on the Teamwork, MME reached out to us to assist in the actual procurement of EVV vendor.

Divya worked on another key engagement with Department of Social Services (DSS) which included Dept. of Health and Senior Services (DHSS), Dept. of Mental Health (DMH) and DSS on Medicaid IT Assessment. As part of this project, Divya led a Team to assess the current state of Medicaid and performed a survey with the key stakeholders to understand the issues, challenges and compare with other similar Medicaid agencies to recommend a solution for DSS.

##### **Iowa Dept. of Human Services – Medicaid Enterprise Modernization Efforts (MEME), Iowa (05/2022 to present).**

Divya is the Engagement and MEME Program leading the Strategic Planning for Medicaid Modernization in Iowa. Divya is currently establishing the governance and project structure for Provider Module DDI work that includes implementation, ORR and CR. Divya leads the program management, vendor collaboration, risk and issues management, deliverable management, CMS liaison for APD and Certification.

#### Vermont Agency of Human Services (AHS) (10/2016 to 08/2017)

Divya worked as Senior IT Project Manager with multiple responsibilities and reporting within the PMO organization at AHS Vermont. He was responsible for program planning and development of an Advance Planning Document (APD) for the Integrated Eligibility & Enrollment (IE&E) program. Divya performed an assessment of the existing solution landscape and recommended a transformation approach to modernize the legacy eligibility system to a SoA-based IE&E system. Divya also established the

groundwork for a Data Governance Council to implement Master Data Management for the AHS. Additionally, Divya provided project management for Pharmacy Benefit Management (PBM) through DDI and CMS Certification supporting R3 review and was instrumental in successful certification of the PBM module within the MMIS.

### **Xerox Business Services, LLC**

New York Department of Health (05/2015 to 09/2016).

Divya oversaw the NY Medicaid DDI work as the PMO Director for Xerox/Conduent engagement. The scope of the implementation covered overseeing the implementing of an open architecture MMIS on an aggressive schedule. Conduent brought the base system from NH MMIS to customize and configure for NY Medicaid using a Hybrid (Agile-Waterfall) methodology. Divya managed the development process, risk and issues, tools, staff onboarding, client management and also ran the steering committee meeting.

### **Infocrossing, a Wipro Company**

Missouri Medicaid Enterprise (MME) Modernization of Legacy MMIS (08/2006 to 04/2015).

Divya was the program leader with Infocrossing and was responsible for all the DDI work for the legacy system modernization contract with Missouri Medicaid System. As part of the modernization Divya implemented over fifteen modules including claims, financial, enterprise service bus, fraud waste abuse, VSAM to DB2 conversion, rules engine implementation and other allied enhancement. In addition to this Divya also implemented 5010/D.0, ICD-10 and CAQH Core administrative updates. During this tenure, Divya closely worked with business operations unit and addressed the system needs to support the multiple call centers for the Medicaid business. Legacy modernization of the MMIS was carried out through multiple steps spanning multiple years. This project successfully used a modified waterfall, agile, and iterative methodology, based on *PMBOK*<sup>®</sup> and Software Engineering Institute CMM standards for program delivery, and established Center of Excellence (CoE) in PMO, testing, and development functions to successfully delivery the program on time and budget.

### **Realsoft, Inc. (04/2004 to 07/2006)**

Divya worked as a program manager for application development with this IT consulting company, he led delivery Teams of 100+ resources to work with fortune clients in the US and successfully delivered mission critical solution. Additionally, he co-owned DevConnect Partner program for multiple Telco platforms (AVAYA, Nortel, Lucent) for joint development, customization, and deployment.

### **Nuntius Systems, Inc. (04/2001 to 03/2004)**

Divya worked as an application manager for this IP core company based out of Silicon Valley, wherein he managed a Team of staff for design, development, and optimization of software products. Additionally, he was responsible for managing client relationships with multiple clients in Silicon Valley. Divya worked on the state-of-the-art platforms to deliver embedded solutions to chip companies.

### **Lucent Technologies (04/2000 to 03/2001)**

Divya worked as a senior Project Manager with Lucent wherein he was responsible for design, development, testing, and deployment of various software solutions for the lucent wireless product suite. This included managing over 80+ staff from offshore location in solution design and development work. Additionally, Divya supported the go-to market Team with the pursuits and also pilot and product launches.

### **Ericsson Limited (08/1996 to 03/2000)**

Divya worked as a technical Project Manager handling design, development, testing, and deployment of products for Wireline and Wireless platform. Additionally, in this role, he analyzed field errors and created improvement plans for better problem management, undertook and successfully completed an extremely challenging GSM System (CPU APZ21220), overhauling, and replacing on a live network at five different customer locations. This was performed meticulously and won customer appreciation.

### **C-DoT Telecom System Integrator (02/1990 to 07/1996)**

As a senior engineer for design services, Divya was responsible for the design, development, integration, testing, and implementation of a telco digital switching system; and for system customization and re-configuration for unique numbering design based on customer requirements. He assisted in transfer of technology for design services, working on system design, production, testing, and integration. In addition, he participated in vendor training and wrote ISO 9001 Quality System for Design Services Unit and obtained accreditation in 1994.

## **Education and Certifications**

MBA, Marketing, Symbiosis Institute of Management

BS, Engineering – Electronics & Communication, University of Madras, India

Certified Project Management Professional®, Project Management Institute®

Scrum Master Certified from Scrum Alliance

Information Technology Infrastructure Library (ITIL) Foundation Certification

Lean Six Sigma Yellow Belt

## **Publications and Presentations**

PMO for modular implementation – presented in MESC 2019

### 3 — Pricing Proposal – Attachment A

#### Attachment A

#### YH23-0128 Medicaid Enterprise System (MES) Independent Verification and Validation (IV&V)

Deliverable	Year One (1)	Year Two (2)	Year Three (3)	Total Amount
Case Management	\$333,420	\$380,200	\$0	\$713,620
Hearing and Grievance	\$225,968	\$373,879	\$69,538	\$669,385
Refactor PMMIS/HPMMIS	\$488,800	\$666,620	\$652,904	\$1,808,324
<b>Three (3) Year Project Grand Total</b>				<b>\$3,191,329</b>

Optional Services A				Total Amount
SI Systems	\$492,440	\$32,847	\$433,573	\$958,860

Optional Services B Snow Modules				Total Amount
User Licensing	\$30,227			\$30,227
ServiceNow Instance Cost	\$30,227			\$30,227
Customer Service Management (CSM) Professional Module	\$30,227			\$30,227
IT Service Management (ITSM) Enterprise Module	\$30,227			\$30,227
Human Resource Service Delivery (HRSD) Professional Module	\$30,227			\$30,227
IT Operation Management (ITOM) Module	\$30,227			\$30,227
Strategic Portfolio Management (SPM) Professional Module	\$30,227			\$30,227
Integrated Risk Management (IRM)	\$30,227			\$30,227

BerryDunn is pleased to submit this pricing proposal to AHCCCS. In review of the Task Order YH23-01218, BerryDunn noticed that the scope in the task order, particularly RFP Section 5, does not align with the scope identified in Attachment A of the task order. Specifically, RFP Section 5 does not include Case Management or Hearings and Grievances. As such, BerryDunn developed its pricing based on the timeline in Exhibit 17 of AHCCCS’s MES Modernization Roadmap. Pricing for active modules beyond year 3 are not included in this pricing, particularly year 4 of the Refractor PMMIS/HPMMIS. BerryDunn looks forward to reviewing its approach to pricing this Task Order with

AHCCCS to help ensure its approach supports the expectations of AHCCCS for this IV&V engagement given the differences in Section 5 and Attachment A.

BerryDunn is responding to this task order under the existing contract, IT Advisory, Assessment, Verification and Validation – Consulting Services, contract CTR053249. It is BerryDunn’s understanding that the current term of this contract ends on December 31, 2023. The price BerryDunn is proposing does not include any rate adjustments allowed for under renewals to the contract.

Reference Table 2 for BerryDunn’s project cost, including position titles, hourly rates, and number of hours required to complete the IV&V services. The price includes the actual hours worked for tasks outlined in proposal Section 1 and is inclusive of all costs.

**Table 2: Proposed Pricing**

Staff/Role	Hourly Rate	Total Hours	Total Cost
Principal	\$335	1,330.6	\$445,751
Project Manager	\$230	4,316.8	\$992,864
Project Business Analyst Sr	\$200	2,342	\$468,400
Project Business Analyst Jr	\$180	4,796.8	\$863,424
Project Technical Analyst Sr	\$225	1,803.6	\$405,810
Support Staff	\$130	116	\$15,080
<b>Totals</b>			<b>\$3,191,329</b>