PUERTO RICO DEPARTMENT OF HEALTH

MONEY FOLLOWS THE PERSON

# NEMT ANALYSIS AND PLANNING
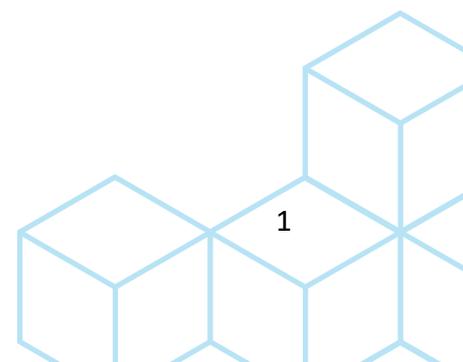
**V2A Consulting**
Technical Proposal
2024-PRMP-MFP-NEMT-003

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## EXECUTIVE SUMMARY

We are pleased to submit our proposal for the Non-Emergency Medical Transportation Gap Assessment (NEMT) in Puerto Rico. Our assessment will aim to shed light on the gaps in current NEMT services offered to our elderly and disabled population, estimate costs to address deficiencies, and guide strategies to cater to Puerto Rico's evolving demographic landscape.

V2A will be partnering with Lateral Strategy, a local market research firm, to deliver a comprehensive study leveraging our Health Care practice's extensive knowledge and experience. There are several factors that position us as the ideal choice to support this engagement:

- **Collaborative experience in health care market research**: V2A has conducted numerous market research studies in multiple sectors including health care. We have studied the health care providers landscape in PR for a leading health plan. We are currently conducting a study for the PR Department of Health and the *Junta Reglamentaria de Cannabis Medicinal*, projecting supply and demand of medicinal cannabis based on target population's health conditions. In both studies, V2A worked in collaboration with Lateral Strategy resources, uncovering key insights and recommendations. In addition, Lateral Strategy has just completed a market study targeting patients that receive home infusion treatments.

- **Deep knowledge of target population**: V2A has developed analytical tools, such as the Social Determinants of Health (SDoH) dashboard that provide detailed socio-demographic data at a regional level of the main factors that impact our population's health, including age, living conditions, transportation needs, income level, etc. For many of our studies, we have leveraged prevalence data of chronic conditions that affect our elderly population. This allows us to be very targeted in understanding our elderly and disabled population's long term support needs.

- **Proven experience in the public sector**: We have experience in the public sector, having successfully executed numerous projects that align with the goals and objectives of public agencies. V2A supported the Puerto Rico Medicaid Program (PRMP) with an Organization Change Management program to ensure the successful

implementation of a new eligibility and enrollment platform. Most recently, V2A, in collaboration with Lateral Strategy, supported OGP with the development of the Comprehensive Plan for Social Reconstruction and Violence Prevention in Puerto Rico. This entailed the facilitation of multiple focus groups and stakeholders in uncovering cross-functional insights and recommendations. Our participation in these projects demonstrates our understanding of the complexities and challenges faced by agencies. Our approach considers the regulatory environment of the public sector, ensuring solutions that are effective and compatible, fostering a collaborative approach among multiple stakeholders in the sector.

We are confident that we can deliver a unique value proposition to the PRMP, by delivering a comprehensive assessment of the NEMT service landscape across the 78 municipalities, including Vieques and Culebra. A robust investigation on the island's target population needs, available modes of transit and service gaps, as well as benchmarking of NEMT models in other jurisdictions will be conducted. A sample size of 1,000+ interviews with the elderly (60+) population, adults with disabilities (21+), living in their communities or nursing facilities, caregivers, and providers will be completed to gather quantitative and qualitative data. Additionally, we will conduct in-depth interviews and focus groups with key stakeholders from government agencies, non-profit organizations, and NEMT service providers. We will also build on what we have developed for our SDoH Dashboard and develop a geospatial database of Medical Services and NEMT Services across the 78 municipalities to understand the needs by region in detail. Finally, all this data will be analyzed, insights will be uncovered, and recommendations will be made to ensure equitable access to NEMT services.

In summary, V2A, in collaboration with Lateral Strategy can effectively deliver a robust analysis of the needs and gaps of Puerto Rico's NEMT service infrastructure and available modes of transit. We will leverage our firm's internal data, socio-demographic and economic dashboards, our bilingual team of native Puerto Ricans that understand our culture, our extensive network in the health care sector and our team's ample experience and capabilities for analyzing data to produce the best possible results for this analysis.
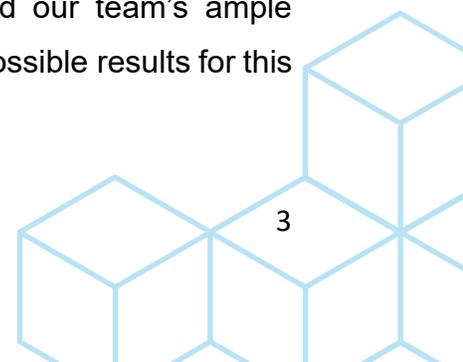
## Title Page

Name:         Graciela Salcedo Canto         Phone: 787-919-7303
Address:      644 Ave. Fernández Juncos       Fax: 787-919-7313
              District View Plaza, Suite 401   Email:
              San Juan, PR 00907               gracielasalcedo@v2aconsulting.com

Subject to acceptance by PRDoH, the vendor acknowledges that by submitting a response and signing in the space indicated below, the vendor is submitting a formal offer to meet that which is being requested within this RFP.

*Graciela Salcedo*  /  3/25/24

Original signature of Signatory Authorized to Legally Bind the Company / Date

Name:               Graciela Salcedo
Title:              Director
Company Name:       V2A Consulting
Physical Address:   644 Ave. Fernández Juncos
                    District View Plaza, Suite 401
                    San Juan, PR 00907
State of Incorporation:  Puerto Rico

By signature hereon, the vendor certifies that:

1. All statements and information prepared and submitted in response to this RFP are current, complete, and accurate.

2. The vendor's response meets the requirement of this RFP.

3. The vendor will comply with all federal and Commonwealth laws, rules, and regulations that are in force currently or anytime during the term of a resulting contract.

4. The vendor acknowledges and accepts that the full response contents and associated documents will become open to public inspection in accordance with the laws of Puerto Rico. PRDoH will hold "confidential" all response information, including both technical and cost information, during the evaluation

process, except for the questions and answers before the submittal of proposals. All other information associated with the RFP, including but not limited to, technical scores and reasons for disqualification, will not be available until after the contract has been awarded in accordance with the laws of Puerto Rico.

5. The company represented here is an authorized dealer in good standing of the products and services included in this response.

6. The vendor, any subcontracting partners, and its proposed resources are eligible to participate in this transaction and have not been subjected to suspension, debarment, or similar ineligibility determined by any federal, state, or local governmental entity; are in compliance with the Commonwealth's statutes and rules relating to procurement; and are not listed on the federal government's terrorism watch list as described in Executive Order 13224. Entities ineligible for federal procurement are listed at https://sam.gov/content/home.

7. Prior to the award, the vendor affirms it will have all current approvals, licenses, or other qualifications needed to conduct business in Puerto Rico.

## CONTEXT AND BACKGROUND

The Money Follows the Person (MFP) grant is a crucial federal initiative in the United States, focused on facilitating the transition of individuals from institutional settings back into their communities or homes. Designed to enhance choice and independence for those receiving medical services, Medicaid agencies implement their MFP initiatives with NEMT networks already in place. That would not be the case in Puerto Rico since there is currently no Medicaid-funded NEMT benefit. However, the need in Puerto Rico is significant, with approximately 15% of the population not owning a vehicle and 92% of the population depending on private vehicles as their main mode of transit as seen in Figure 1.
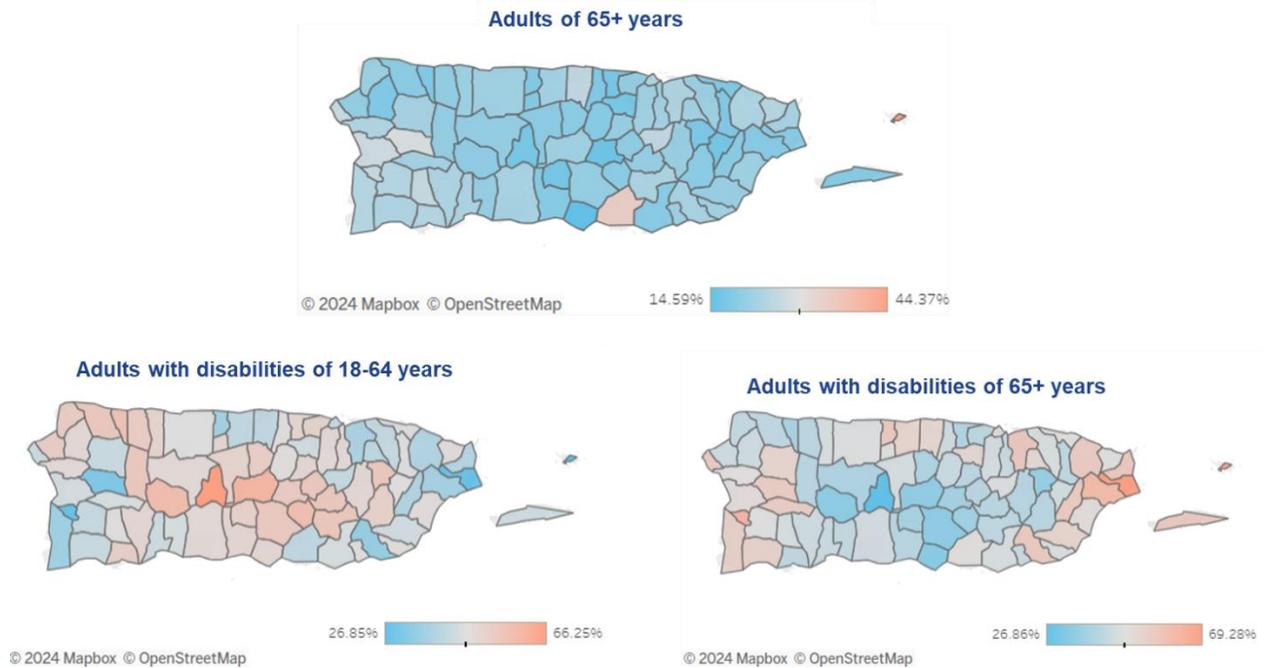
*Figure 1: Puerto Rico map highlighting mode of transit data by municipality*
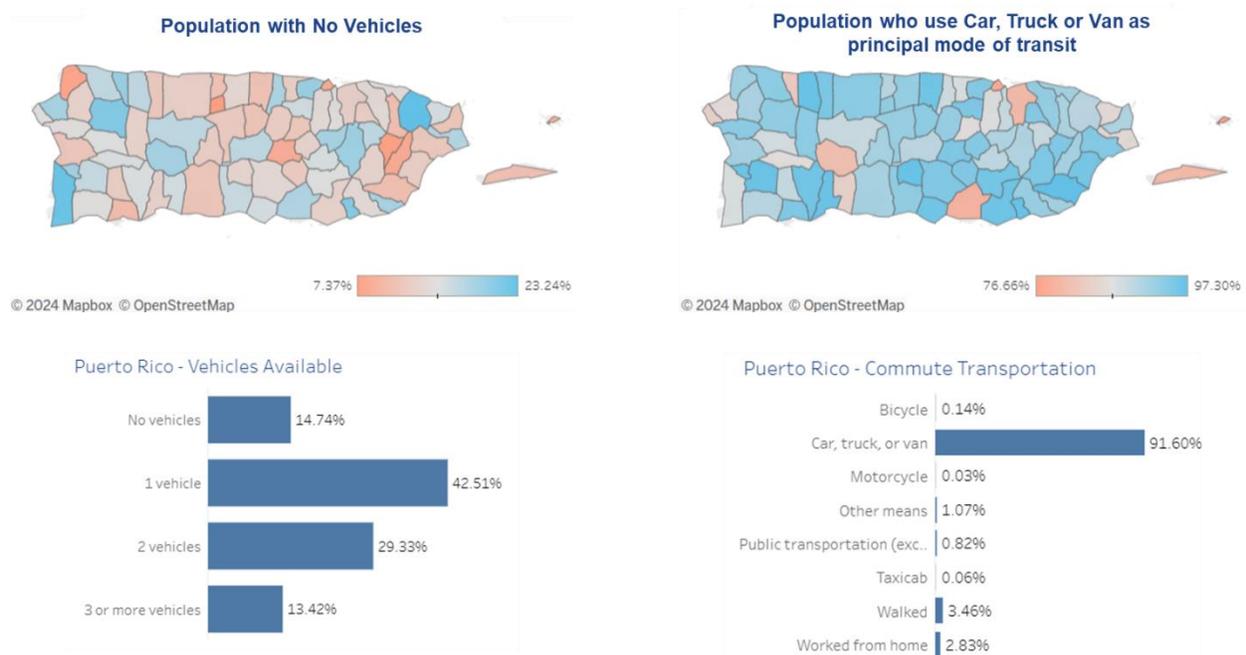


Source: V2A SDoH Dashboard

Puerto Rico experiences an unprecedented demand for Non-Emergency Medical Transportation (NEMT) due to a growing senior population and the need to push medical care from institutional settings to home and community-based (HCBS) settings. Figure 2 highlights the population to be studied by region.

*Figure 2: Puerto Rico map highlighting population to be studied by municipality*

**Adults of 65+ years**

© 2024 Mapbox © OpenStreetMap    14.59%    44.37%

**Adults with disabilities of 18-64 years**

© 2024 Mapbox © OpenStreetMap    26.85%    66.25%

**Adults with disabilities of 65+ years**

© 2024 Mapbox © OpenStreetMap    26.86%    69.28%

Source: V2A SDoH Dashboard

The NEMT Gap Analysis looks to evaluate modes of transit and system accessibility for the elderly and disabled, eligibility for transportation services, system costs and how services will be managed.
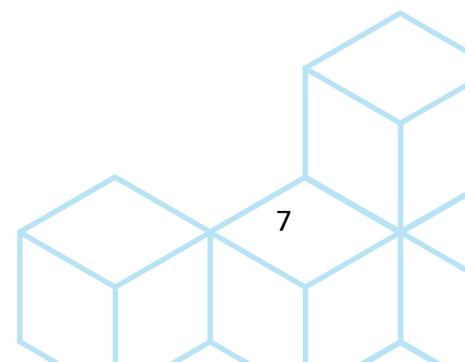
## APPROACH AND METHODOLOGY

Our approach to the Non-Emergency Medical Transportation (NEMT) Gap Analysis, as outlined by the PR Department of Health, entails a comprehensive strategy to understand the current state of the NEMT services in the island, its gaps, and recommendations to cover those gaps. This includes the main island's urban and rural locations, including Vieques and Culebra.

Initially, we will establish clear goals closely aligned with the proposal's objectives. These encompass establishing a good understanding of the transportation infrastructure and available modes of transit per municipality, available NEMT service providers in all 78 municipalities and the challenges providing these services to the target population.

To do this, we will leverage experts in the transportation space to get deep insights into the sector's state. We will also heavily lean on our analytics practice capabilities to incorporate geospatial data into the analysis. To ensure we capture the voice of the patient, we will administer a thorough survey assessment, aligned with the proposal's objectives,

The targeted population for this assessment includes individuals requiring NEMT (elderly 60+ and people with disabilities 21+), caregivers, government agencies, non-profits, and service providers. We plan to collect their insights using a combination of quantitative and qualitative methods, such as surveys, interviews, and focus groups.

To ensure a representative sample, we will implement a targeted strategy, considering demographics, geographical locations, and socioeconomic backgrounds. This approach aims to provide a holistic view of the NEMT landscape in Puerto Rico. The assessment itself will identify areas for improvement, potential gaps, and opportunities for policy enhancements, NEMT service augmentation, and funding targets.

Transparency is a cornerstone of our approach, with a commitment to delivering a comprehensive report that highlights key insights and proposes actionable steps for improving NEMT in Puerto Rico. Drawing on our 20 years of experience in the Puerto

Rico healthcare sector, we will actively leverage our networks to identify contacts and obtain referrals, ensuring a high and desired participation rate. Our goal is to lay the groundwork for informed decision-making and the development of effective, tailored solutions.

The methodology we will apply to complete the assessment will consist of 4 phases, with detailed activities and deliverables shown in Figure 3.
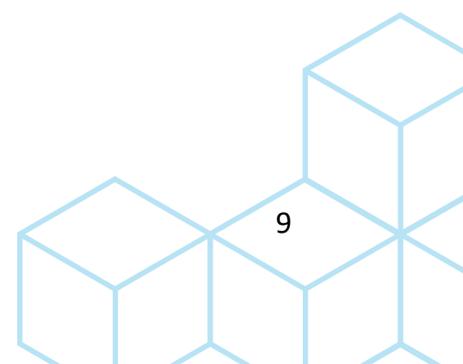
*Figure 3: Methodology Phases*
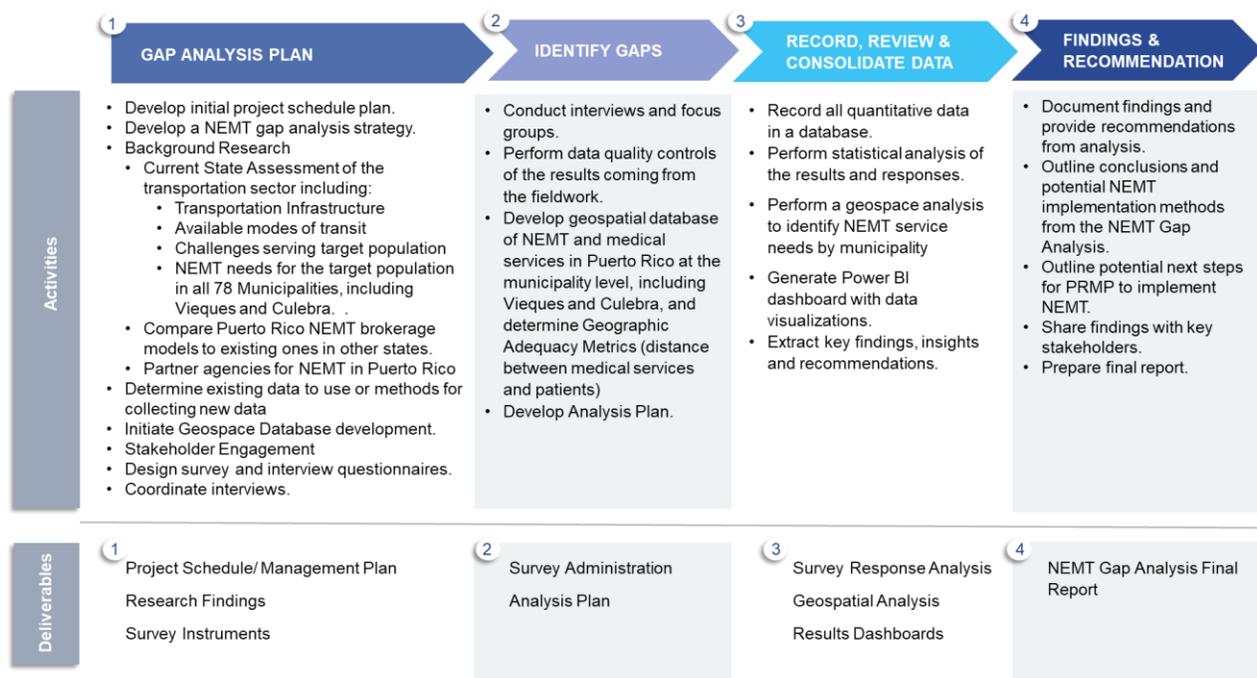


**PHASE 1: GAP ANALYSIS PLAN**

During this first phase, our team will study the current landscape of Puerto Rico's transportation sector, leveraging our V2A SDoH Dashboard. Analyze in detail information on Money Follows the Person (MFP), and Non-Emergency Medical Transportation (NEMT) Services including benchmarking other jurisdictions, current services provided in Puerto Rico and partner agencies, comparing NEMT brokerage models to existing ones in other states. The analysis will focus on:

- Assessing quality and efficiency of transportation services

- Evaluating adequacy of service coverage, ensuring accessibility for patients with diverse needs
- Analyzing transportation data to identify trends, and potential areas to be enhanced and generate reports.
- Identifying potential risks associated with transportation services, ensuring the safety and security of patients during their transit.
- Reviewing of all available modes of transit, including mass transit, municipal and nonprofit on demand transit, ride sharing options, and informal friends and family options.

To ensure all key activities are clearly documented, a project schedule will be developed, and on-going stakeholder management will be maintained with weekly status updates to the MFP project lead and monthly steering committee meetings to review project progress with PRMP leadership. As part of the project management functions, the team will keep a log of risks and issues and maintain constant communication with the MFP team to ensure the project flows smoothly and any issues are addressed in a timely manner.

We will design survey variants in both English and Spanish to be conducted based on the various segment populations, as well as interview guides for focus groups and in-depth interviews. In preparation for the next phase, the interviews will be coordinated, and we will initiate the geospace database development.

## PHASE 2: IDENTIFY GAPS

The survey will be conducted by phone, with an option to complete in person if sample size is not reached by phone, ensuring convenient access for participants. A team of culturally sensitive, bilingual field evaluators will conduct the interviews. We will ensure accessibility requirements are met. Our goal is to maximize participation and gather comprehensive insights from all potential respondents. Close communication will be critical to stay aligned regarding fieldwork progress toward completion. Lateral Strategy will conduct interviews and surveys as per the schedule displayed in Figure 4. All interviews will be recorded and can be transcribed. As the data becomes available, we will perform data cleanup, validation, and quality control. Finally, an Analysis plan will be developed to take us into the next phase.

*Figure 4: Survey Methodology*

| Population | Method | Time | Universe | Sample Size (90% confidence) |
|---|---|---|---|---|
| Elders (60+) | Phone or In-Person Interviews | 8-10 minutes | 702,334 | 275 |
| People with disabilities (21+) | Phone or In-Person Interviews | 8-10 minutes | 1,404,658* | 275 |
| Caregivers | Phone or In-Person Interviews | 8-10 minutes | 500,000 | 275 |
| Providers (Direct service workers (DSW) including home health aids and nursing assistants) | Phone or In-Person Interviews | 20-30 minutes | 6,700 | 270 |
| Non-profit organizations providing home health services (AARPS, SIGA, COSALL, Caregivers of PR, Alianza apoyo al Cuidador, and others) | Virtual Focus Groups | 45-90 minutes each | 10 | 2 |
| Government agencies (Salud, Familia, Procuradora del Paciente, del Envejeciente, Municipios, etc.) | Virtual/Phone in-depth Interviews | 30-40 minutes | n/a | 10 |
| NEMT Service Providers | Virtual/Phone in-depth Interviews | 30-40 minutes | N/A | 10 |

*Total with disabilities distributed as follows: 9.9% have difficulty hearing, 11.0% have self-sufficiency difficulties, 13.5% have vision difficulties, 19.6% cognitive difficulties, 20.5% have difficulty living independently, and 25.4% have an ambulatory disability.

While the field work is being completed, we will leverage what we have built in the V2A SDoH Dashboard and develop a geospatial database of population, existing NEMT coverage, medical services locations, and other social determinants of health. Existing NEMT coverage may be mapped at the census tract level depending on availability of data. Coverage data will allow for a functionality to be implemented to determine serviceability based on household location (using a ray-casting algorithm). Additionally, this database will enable geospatial analysis to determine NEMT coverage adequacy. The database can be developed in any of the common GIS tools like QGIS or ArcGIS. Leveraging past projects, we already have the majority of the medical service providers with their geolocation, this will simplify the amount of work needed to determine average distances between the medical services providers and the patient's household.

## PHASE 3: RECORD, REVIEW & CONSOLIDATE DATA

After completion of the fieldwork, and validation of the compiled data, additional transformations may be necessary to get responses in a format adequate for analysis. Once data is ready for analysis, different statistical methods will be applied to extract insights and draw conclusions, aided by Power BI graphs, charts and tables to illustrate

the results. V2A utilizes AI tools that perform sentiment analysis and facilitate the analysis of responses in an automated manner.

In parallel, the geospatial analysis will be completed. Leveraging the data available in the V2A SDOH Dashboard, the data capture in the database buildout, and the survey results, we intend to be able to determine demographics for the target population at the census tract level, NEMT and Medical services coverage adequacy including travel time analysis, and SDOH care needs.

## PHASE 4: FINDINGS AND RECOMMENDATION

Based on the analysis of survey responses and applicable best practices, recommended actions will be developed to address the identified challenges and barriers within the Puerto Rico Medicaid eligibility framework. These recommendations, the main findings complemented with visuals and all pertinent details from the survey process and methodology, will be put together in the NEMT Gap Analysis Final Report and presentation. The Gap Analysis report will include recommendations to close transportation gaps considering a transportation brokerage model, innovative models like rideshare, and any other cost-effective initiative that could be implemented with no or limited additional funding. We will also perform a funding analysis to determine the use of Medicaid administrative funding as opposed to Program funding for eventual NEMT service costs. All findings will be presented to PRMP management and other key stakeholders.

## WORKPLAN AND TIMELINE

Figure 5 illustrates the Work Breakdown Structure (WBS) of the project including proposed phases and activities.

*Figure 5: Project Work Breakdown Structure*
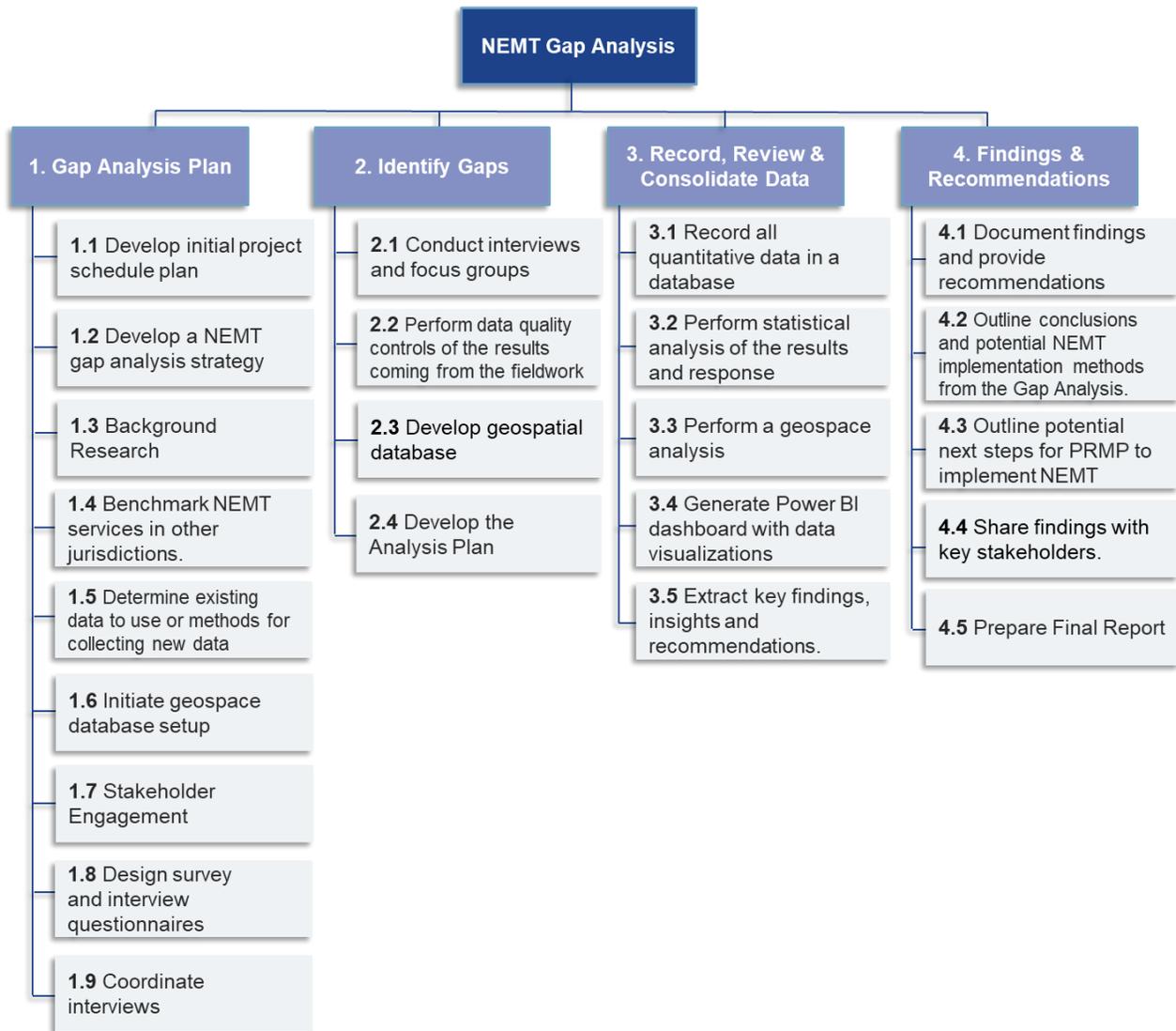


The four phases of the engagement will be completed over a span of 12 months as depicted in the timeline shown on Figure 6. Task dependencies are shown in the gantt chart.

## *Figure 6: Proposed timeline*

| Activity | Month 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | Responsible |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Phase 1: Work Plan** | | | | | | | | | | | | | |
| Develop initial project schedule plan | ■ | | | | | | | | | | | | V2A |
| Develop a NEMT gap analysis strategy | ■ | ■ | ■ | | | | | | | | | | V2A |
| Complete background research | ■ | ■ | ■ | | | | | | | | | | V2A |
| Benchmark NEMT services in other jurisdictions | | ■ | ■ | | | | | | | | | | V2A |
| Initiate geospace database setup | | ■ | ■ | | | | | | | | | | V2A |
| Develop surveys | | | ■ | | | | | | | | | | V2A/Lateral |
| Coordinate interviews | | | ■ | | | | | | | | | | V2A/Lateral |
| Perform weekly status reporting and monthly updates | ▲ | ▲ | ▲ | ▲ | ▲ | ▲ | ▲ | ▲ | ▲ | ▲ | ▲ | ▲ | V2A |
| **Phase 2: Conduct Assessment** | | | | | | | | | | | | | |
| Conduct surveys | | | | ■ | ■ | ■ | ■ | | | | | | Lateral |
| Conduct focus groups | | | | | | | ■ | ■ | | | | | V2A/Lateral |
| Fieldwork, recruiting and tracking of assessment | | | | ■ | ■ | ■ | ■ | ■ | | | | | Lateral |
| Develop geospace database of Medical and NEMT Services | | | | ■ | ■ | ■ | ■ | ■ | | | | | V2A |
| Perform quality control | | | | ■ | ■ | ■ | ■ | ■ | | | | | Lateral |
| Deliver analysis plan | | | | | | | | ■ | | | | | V2A |
| **Phase 3: Record, Review & Consolidate Data** | | | | | | | | | | | | | |
| Complete data analysis | | | | | | | | | ■ | ■ | | | V2A |
| Create visualizations with data | | | | | | | | | ■ | ■ | | | V2A |
| Extract Findings | | | | | | | | | ■ | ■ | | | V2A |
| **Phase 4: Findings & Recommendation** | | | | | | | | | | | | | |
| Present Findings | | | | | | | | | | | ■ | | V2A |
| Complete final report | | | | | | | | | | | | ■ | V2A |
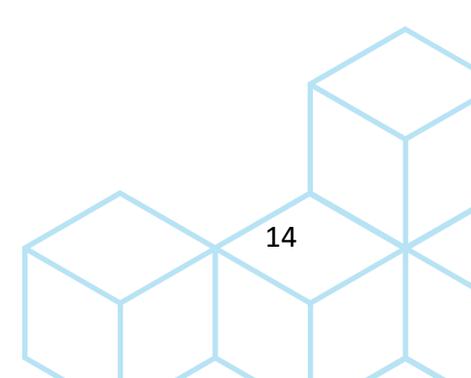
**FIRM INFORMATION**

**About V2A**

V2A Consulting is a leading management consulting firm based in San Juan, PR with 20 years of experience helping clients define and achieve their objectives. Our mission to serve, partner, and excel with the right clients, people, and community is present in everything we do. We are a trusted advisor to CEOs and top executives in service organizations across Puerto Rico and the Caribbean basin. We have supported dozens of organizations in Strategic Planning, Operational Excellence, Organizational Development and Market and Business Analytics.

**We differentiate ourselves by our philosophy:**

- We believe that management teams should **"own"** their strategic management processes. We do not tell clients what to do but rather **work together** to find the right strategy together with **implementable** solutions.
- We believe in building **deep relationships** with a limited number of clients, allowing a comprehensive understanding of their business. We cherish the **trust** and **confidence** our clients place in us.
- We believe that our clients' results define our success. More than just defining visions and plans, we emphasize the development of specific, high-impact **actions** and help our clients achieve **results… from Vision to Action.**

We are deeply committed to the success of our clients and adhere to the following guiding principles through our work:

- **Focus on impact.** We help clients achieve tangible short- and long-term impact.
- **Focus on strategy.** Our approach considers the strategic value of each engagement element, seeking to provide strategic insight into all aspects.
- **Know the culture.** We are keenly aware of cultural strengths and challenges and are thus able to adjust our recommendations to accomplish great results.

- **Remain independent.** We think independently and offer our vision without any agenda or bias.
- **Be practical.** The solutions offered are pragmatic and applicable from "day 1", and we try to leverage our clients' existing resources to minimize unnecessary or excessive investments.
- **Work as a Partner**. We believe in building lasting relationships, collaborating with our client's leaders, and sharing their challenges and successes.

**V2A's Healthcare Practice** has helped multiple organizations in both the private and public sector tackle complex strategic challenges, including payors, providers such as hospitals and medical groups, and regulatory entities.

**V2A's Market & Business Analytics Practice** provides deep analytics services and regularly publishes dashboards, insights, and market reports. The main analytics services it provides are the following:

**Market Research and Economic Trends:** We help our clients to size market opportunities for new ventures. We perform analyses of economic, demographic, and industry trends for executive teams as part of their regular strategic planning sessions.

**Business Intelligence and Reporting:** We work with organizations to build their reporting infrastructure and train their personnel to use the most common visualization tools for dashboards and reports.

**Financial Analysis and Forecasting:** We assist organizations in financial planning and forecasting, performing cost-benefit analyses for new projects, and building client and client segments profitability and reporting (including cost allocation and transfer pricing).

**Predictive Analytics, Machine Learning and AI:** We use data mining and statistics to forecast potential outcomes of our customers' operations and recommend the most appropriate actions under the expected scenarios. We train machine learning models to, among other things, make predictions, recommend the most suitable products at the point of sale, and segment the customer base to adapt the value proposition to each segment.

The following table shows a sample of recent engagements with clients:

## Table 1: Sample of V2A's Healthcare and Market & Business Analytics Experience

| Focus Area | Year | Project Description |
|---|---|---|
| Strategy | 2022 | • Design and implementation plan for the strategy of the Comprehensive Cancer Center of Puerto Rico |
| | 2019 | • Development of a 3-year Strategic Plan for a private hospital in Puerto Rico, with prioritized initiatives |
| | 2012-2013 | • Development of a Strategic Plan in medical, life and property insurance conglomerate |
| Project Management | 2016 – 2021 | • Design and implementation of project management office (PMO) in medical, life and property insurance conglomerate<br>• Management of a portfolio of over 100 initiatives across all departments in the organization<br>• Help conduct monthly governance meetings and visibility of portfolio status |
| Organization | 2020-2021 | • Change Management Support in the transition to a new eligibility platform in a Medicaid agency with over 600 impacted employees |
| | 2019 | • Redesign of sales unit to maximize sales in insurance company |
| Market and Business Analytics | 2021-2022 | • Develop new & improved location and serviceability processes for a local telecom's client database. Conducted careful assessment of existing processes, by updating coverage maps in QGIS, determining the serviceability of each location in the database, standardizing addresses and improving current client's geolocation (automatic geocoding of addresses).<br>• Toolkit developed using Power Apps and Power BI to guide in the implementation of a centralized grants management office and electronic grants management system. The toolkit includes a set of dashboards to monitor KPIs. |
| | 2019 | • Development and implementation of an application to digitize the subscription sales process in a Medicare Advantage plan in the U.S. |

| Focus Area | Year | Project Description |
|---|---|---|
| Operational Excellence | 2021 | • Diagnosis, design and implementation of a program to improve the providers' experience with insurance company.<br>• Definition of the transformational vision, organizational redesign of provider contracting and service units, and mapping of the provider journey |
| | 2019 | • Improvements in health plan enrollment, underwriting and billing processes using LEAN methodology |
| | 2022 | • Management of the proposal development process in two insurance companies to participate in the government health plan |
| | 2018– 2019 | • Development of clinical and financial models for the new plan contract |
| | 2018 | • Design and implementation of sales and promotions stimulation program in an insurance company, focused on Medicare Advantage that resulted in a substantial increase in sales and a reduction in disenrollments to the plan<br>• Executive dashboard design to monitor sales, retention and dienrollment during the subscription period<br>• Improvements in the process of designing products and benefits in medical plans fostering inter-departmental collaboration |
| | 2018 | • Diagnostic, design and implementation of initiatives to improve service to policyholders in an insurance company |
| | 2017 | • Improvements in insurer claim processes using LEAN methodology |

| Focus Area | Year | Engagement Description |
|---|---|---|
| **Market Research and Economic Trends** | 2023 | • Market research study to understand the nuances of the Puerto Rico Medical Cannabis program and compare local public policy dynamics to benchmark jurisdictions to provide an assessment of the performance of the program, as well as make recommendations to improve it.<br>• Market research study aimed at understanding the current state and nuances of the healthcare industry in Puerto Rico. Deliverables included a complete deck with the findings and recommendations, a database with all the information gathered and a Tableau dashboard with key interactive visualizations.<br>• Market research aimed at understanding the current economic trends in Puerto Rico, the federal economic stimulus planned for the next five years, and the impact these stimulus could have on the island's economic environment |
| | 2022 | • Market research for a new banking entity applying for FDIC approval<br>• Report on current economic trends for publicly traded payment processing institution<br>• Assessment of economic impact from Federal stimulus package in Puerto Rico |
| | 2020 | • Study of the socioeconomic contributions of the PR's banking sector for the PR Bankers Association |
| | 2019 | • Market research of the Puerto Rico auto financing industry for a new used auto loan financial institution |

## Our Leadership and Key Staff

At V2A Consulting, we are proud of our team of 70+ talented professionals who share a passion for delivering value. Our core team has extensive experience in a variety of management fields developed through leadership positions with multinational corporations, together with professional experiences at leading consulting firms and solid educational backgrounds from top universities. Detailed credentials of V2A's engagement team leaders that will be collaborating in this engagement is included in Figure 7 below:
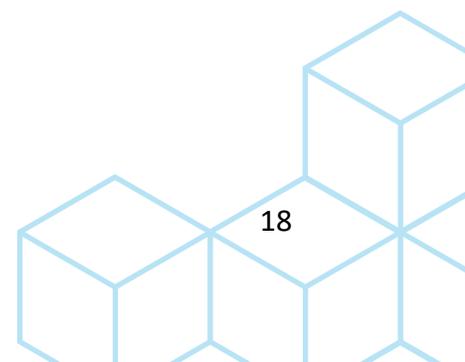
*Figure 7: Key Staff and Relevant Experience*

| Name | Experience |
|------|-----------|
| **Graciela Salcedo**<br>Director | • Graciela Salcedo has more than 20 years of experience in the areas of market research, process improvement, strategic planning, project management and brand management. She leads the Healthcare sector practice in the firm, with experience supporting medical plans, hospitals, health providers and regulatory entities.<br>• Graciela has a BS in Mechanical Engineering from the University of Pennsylvania, and a Master's Degree in Industrial Engineering from the Rochester Institute of Technology. Additionally, she attended Harvard Business School's Leading Professional Service Firms program. |
| **Xavier Diví**<br>Director | • Xavier Diví has over 15 years of experience in various financial and economic development areas. Xavier currently manages most of the content development for our knowledge-sharing publications. He leads our expanding Applied Business Analytics practice specializing in Predictive Modeling, Market and research intelligence, Clustering/segmentation analyses, and Geographic analytics.<br>• Xavier has a BS & MBA from the ESADE Business School in Spain |
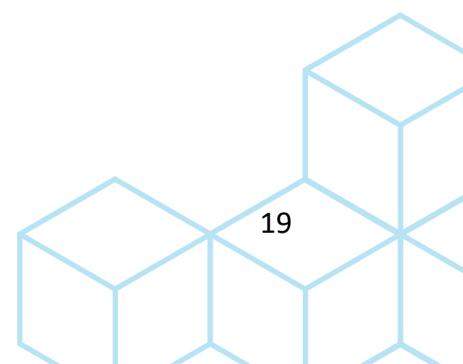
**Mariam Rivera**
Senior Engagement Manager

- As Senior Engagement Manager, Mariam Rivera has led projects in the areas of operational improvements and organizational development in several service industries such as the public sector, telecommunications, and healthcare. Mariam has conducted capacity assessments on multiple utilities and provided support on the implementation of capacity management with tool development, giving visibility to staff allocation and needs to be part of decision making regarding Human Resources. tMariam's background in Industrial Engineering and as certified Project Management Professional has contributed to the identification of Operational improvements through multiple assessments and projects leading to increase staff efficiency and  productivity along with the structuring and deployment of  enhancements in management infrastructure.oShe has a B.S. in Industrial Engineering from the University of Puerto Rico Mayaguez campus.



**Geraldine Rodríguez**
Senior Engagement Manager

- Geraldine Rodríguez leverages her ten years of experience in the public sector to identify operational and organizational opportunities that can result in improved operations and civil service. She led various human resource capacity assessments in local and state government agencies, revealing insightful gaps and approaches to bridge the objectives. She has also led multiple engagements in developing strategic plans and implementing initiatives with measurable outcomes.

- Geraldine holds a Bachelor's of Design in Architecture from the  University of Florida and a Master's degree in Architecture from UPR.

**Mario González**
Engagement Manager

- Mario González has five years of management consulting experience, including his last two years in the Telecom Industry and additional experience in the healthcare industry; he also had a 5-year career in the Energy Industry.
- Has managed multiple projects in the Telecom Industry, including Post Merger Integration, Network Transformation Programs, and Operational Readiness Programs.
- He holds a B.S. in Electrical Engineering from the University of Puerto Rico and an MBA in General Management from the University of Texas at Austin



**Coral Frederique**
Engagement Manager

- Coral brings over 8 years of experience in management consulting, government fiscal and financial restructuring, strategic planning, and pharmacy benefit management. Previous experience includes Senior Manager of Rebate Operations and Underwriting in Abarca Health and Associate Director of Fiscal Restructuring at Puerto Rico Fiscal Agency and Financial Advisory Authority (MFAF).
- Coral holds a BS in Finance and Accounting from the University of Puerto Rico Río Piedras

**José Pablo Pérez**
Analytics Manager

- José Pablo has extensive experience in Market research and intelligence, as well as data reporting and clustering/segmentation analyses. He has also managed geographic analytics. He has experience in business strategy and analysis, lean methodology, process optimization, and organization development. Currently focused on providing analytics solutions to our clients.
- Massachusetts Institute of Technology (MIT); B.S. & M.S.
- Quantic School of Business Technology; MBA

**Elvis Torres**
Data Engineer

- Elvis has several years of experience with ETL processes, data analysis and visualizations. Experienced with coding languages and structured data applications. Elvis created and developed V2A's Social Determinants of Health (SDoH) dashboard.
- Elvis holds a Bachelor's in Science from the University of Puerto Rico, Río Piedras campus and a PhD in Environmental Science

**Grace Santana**
Subject Matter Expert

- Grace Santana Balado is an attorney and former Puerto Rico Chief of Staff. Before her appointment, Santana Balado served as executive director of the Authority for the Financing of the Infrastructure of Puerto Rico and as executive director of the Puerto Rico Public-Private Partnerships Authority

- As Executive Director of the Puerto Rico Infrastructure Financing Authority, Santana supervised planning, procurement, and development of high priority infrastructure projects with a total investment of $470 million. Santana-Balado was responsible for prioritizing infrastructure projects for the Commonwealth of Puerto Rico as part of a five-year period per envisioned in the Puerto Rico Fiscal and Economic Growth Plan of 2015 comprised of $3.3 billion of Commonwealth's funds for infrastructure. She was also in charge of the pre-development and permitting process of a multi-million dollars highway infrastructure project. Managed the preparation of proposals seeking federal funding for a multi-million dollars transportation project aimed at interconnecting cities and seamlessly integrating diverse transportation projects. Demonstrated proficiency in navigating regulatory requirements and securing vital financial resources to drive forward the envisioned urban connectivity and transportation integration objectives. As Executive Director of the Puerto Rico Public Private Partnerships Authority, she supervised contract negotiation related to the amendment of PR-22 toll road concession agreement

V2A is partnering with Lateral Strategy, a market research and innovation firm based in Puerto Rico specializing in the healthcare industry, adding more than 10 years of experience performing Market Research studies and more than twenty collaborating with different actors of the healthcare landscape in Puerto Rico. The combined experience, knowledge, and professional network of V2A and Lateral Strategy, presents an unmatched knowledge of the local healthcare landscape.

## About Lateral Strategy

Lateral Strategy is a market research and innovation firm based in Puerto Rico, specializing in the healthcare industry. With over 10 years of experience, we possess unmatched knowledge of the local landscape, making us the ideal partner for healthcare organizations seeking innovative solutions tailored to Puerto Rico's unique market.

Our team of experienced strategists and consultants combines lateral thinking with strategic problem-solving, enabling us to uncover unique opportunities and challenge the status quo in the healthcare sector. We are dedicated to executing high-quality studies and delivering actionable insights that help our clients succeed.

Our local expertise sets us apart from larger global firms, providing us with a distinct advantage in the healthcare industry. At Lateral Strategy, we employ a comprehensive approach to address the complexities of Puerto Rico's healthcare system. Through successful partnerships with numerous healthcare organizations on the island, including health insurance companies, pharmaceutical manufacturers, hospitals, and pharmacies, we have gained valuable insights that allow us to drive meaningful impact in the industry.

At Lateral, we work closely with a reputable company of professional and experienced recruiters specialized in hiring surveyors. This ensures that we maintain the highest standards of expertise and professionalism in our evaluation processes. We are confident that we will provide a comprehensive list of surveyors that will be able to reach all municipalities including Vieques and Culebra if awarded the project.

As a research group, we specialize in Human Centric Research, using techniques that focus on understanding participants and identifying new opportunities.

A list of some of our recent project can further portray our experience: ⌷OBJ⌷

## Table 2: Sample of Lateral's experience

| Industry | Project Objectives | Methodology |
|---|---|---|
| **Specialty Pharmacy** | Co-create a Journey for success to create best hospital employer in the area | • 36 one on one interviews to understand Md's, Nurses and other workers -what they expect, how they feel and - most importantly - what they need from a Hospital.<br>• 4 Facilitations to co-design new concept based on learnings, develop and test |
| **Health Insurance Company** | Understand Advantage Selection Process | • 12 in depth 1:1 interview with Advantage users and decision makers (could be caregiver) -<br>• Immersive mobile research with 36 Advantage Users enabling us to get closer to the moments that matter most and learn what life is really like for users. Optimized with an interactive journaling exercises leveraging WhatsApp with 12 Advantage users and decision makers (could be caregiver) |
| **Pharmaceutical Company** | Discover what would make youth respond to a vaccine's message and collaboratively develop (MD's, Ad Agency and Lateral Strategy) to a more strategic communication campaign. | • 4 focus groups with youth 18-21 Years old<br>• 2 Focus groups with youth parents and<br>• 2 Sensemaking & Ideation Facilitations with Md's, Advertising Agency and Pharmaceutical Company where the learnings were used to inspire more meaningful ideas.<br>• This study was conducted for multiple vaccines |
| **Specialty/Infusion Pharmacy** | Identify needs of patients who receive home infusion treatments so Pharmaceutical Company can develop a value proposition and become the pharmacy of choice for these patients. | • Qualitative Study<br>• 26 in-depth interviews with patients, case managers and physicians.<br>• 4 triads with patients<br>• 1 focus group with social workers. |

| Industry | Project Objectives | Methodology |
|---|---|---|
| **Pharmaceutical Company** | Developing insight-based-strategies to increase vaccination rates among adults in the United States and Puerto Rico, in collaboration with the Centers for Disease Control | • Thirty 1:1 in depth interviews with Decision Makers at the Awardee (state level)<br>• Five 1:1 in depth interviews with public health officials at the CDC (federal level)<br>• 20 focus groups interviews with adults with a completed vaccination schedule<br>• 20 focus groups interviews with adults with an incomplete vaccination schedule<br>• 1,000 quantitative interviews to confirm and quantify findings from focus groups |
| **Pharmaceutical Industry Association** | Stakeholder mapping Puerto Rico's dynamic payor system for the Puerto Rico Pharmaceutical Industry Association (PIA) | Multiple 1:1 interviews with thought leaders in the following organizations:<br>• PBMs & health insurance<br>• Procurador del Paciente<br>• ASES<br>• Comisionado de Seguros<br>• Key physicians within IPAs, Hospitals and other health networks |
| **Patient Advocacy Organization** | Develop and Advocacy and Prevention Campaign for at risk minorities in the United States with Sponsors from Pharmaceutical Companies | • Kidney Disease Patients & Caregivers Ethnography with 21 panelists for a 7-day engagement identify insights to understand the barriers to care and checkups, preconceived notions of kidney disease, and find ways to generate awareness about kidney disease<br>• 3 facilitations with Sponsors to make sense out of the data, optimize the stimulus and further align to test 3 concepts with other stakeholders. |

| Industry | Project Objectives | Methodology |
|---|---|---|
| **Pharmaceutical Company** | Conducting market assessments and forecasts for multiple product launches in therapeutic areas such as: hematology-oncology, respiratory, rheumatology, gastroenterology, endocrine, dermatology, and transplant disease states | Methodologies varied according to disease state, but included a mix of:<br>• Secondary syndicated data analysis (IQVIA, Syneos, ZS, among others)<br>• Epidemiological data analysis<br>• Primary research with qualitative (1:1 in depth, triads, focus groups, ethnography, patient & physician journaling, patients record monitoring, case studies) and quantitative methodologies:<br>• KOL interviews<br>• Health Care Physician and stakeholders (assistants, nurses, etc) interviews<br>• Patient Interviews<br>• Payor interviews<br>• Government and public policy experts<br>• Hospital administrators<br>• Relevant Wholesaler and Pharmacy decision makers (Point Of Sales)<br>• Patient Advocacy Organizations |
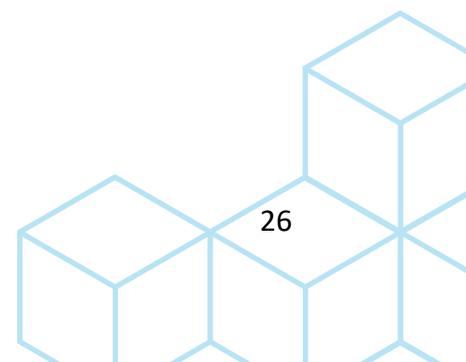
## Project Organization and Staffing

V2A is proposing a team structure as shown in Figure 8. Graciela Salcedo (V2A Director) will serve as Account Manager for this project, with the support of Alexandra Suárez and Natacha Suárez (Directors Lateral Strategy). As Account Managers, we will be responsible for overall delivery of the project and will be available to the PRDOH throughout the life of the engagement. A Steering Committee will be put in place to guide the project coordination and ensure recommendations are aligned with PRDoH expectations.

The team will be comprised of a dedicated Engagement Manager (EM) and one Consultant throughout the length of the entire project. The team will also include Jose Pablo Perez as the Analytics Manager guiding one Data Engineer during the first three phases. During phase 2 of the engagement, the team will include 6 field evaluators from Lateral Strategy. The EM will serve as Project Management liaison with PRDOH. We suggest PRMP designate a project leader (ideally the MFP lead) who will help us facilitate access to data and information as required. The Engagement Manager will also keep a Risk and Issue log that will be discussed with the MFP Project Lead, this amongst having a constant and transparent communication with PRDOH and MFP Team, will be key in the success of this project.

### *Figure 8: Proposed Team Structure*
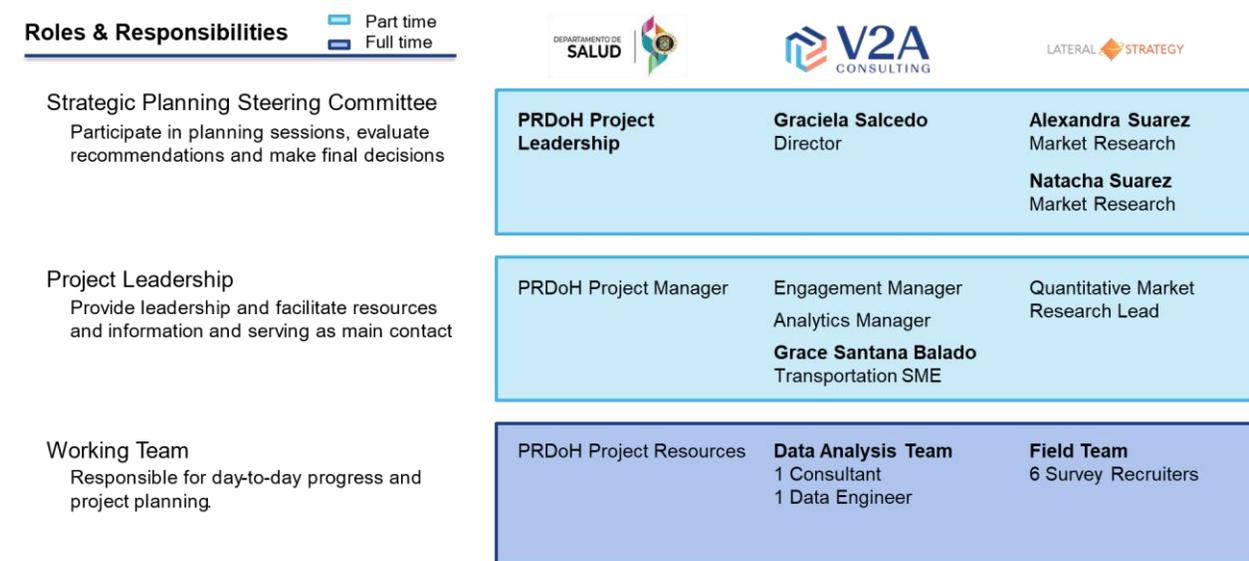
## REFERENCES

**Vendor References**

*Table 1: Vendor Reference #1*
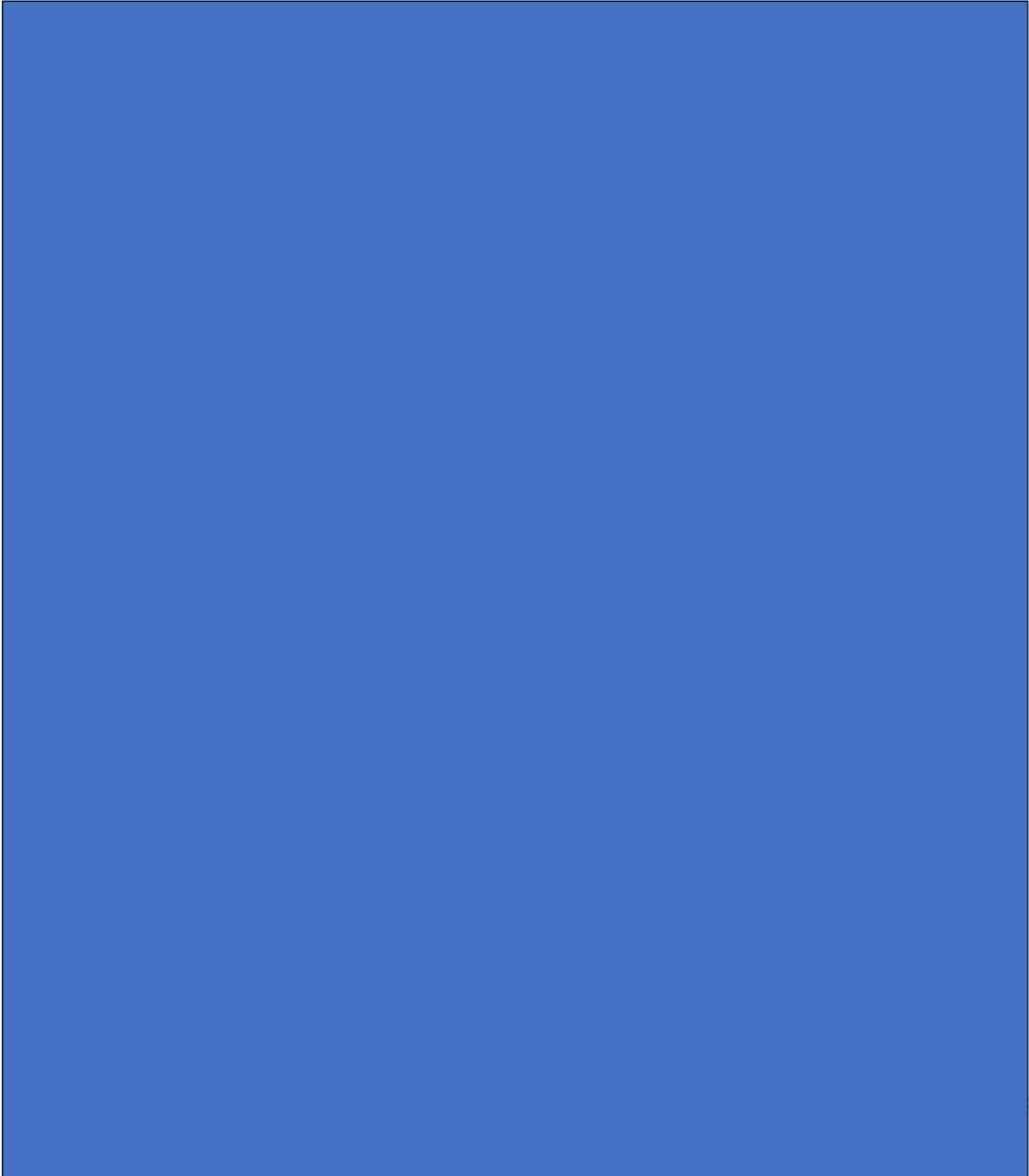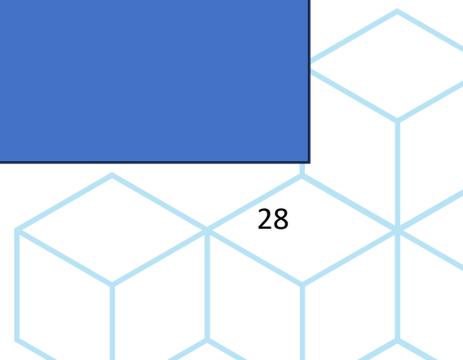
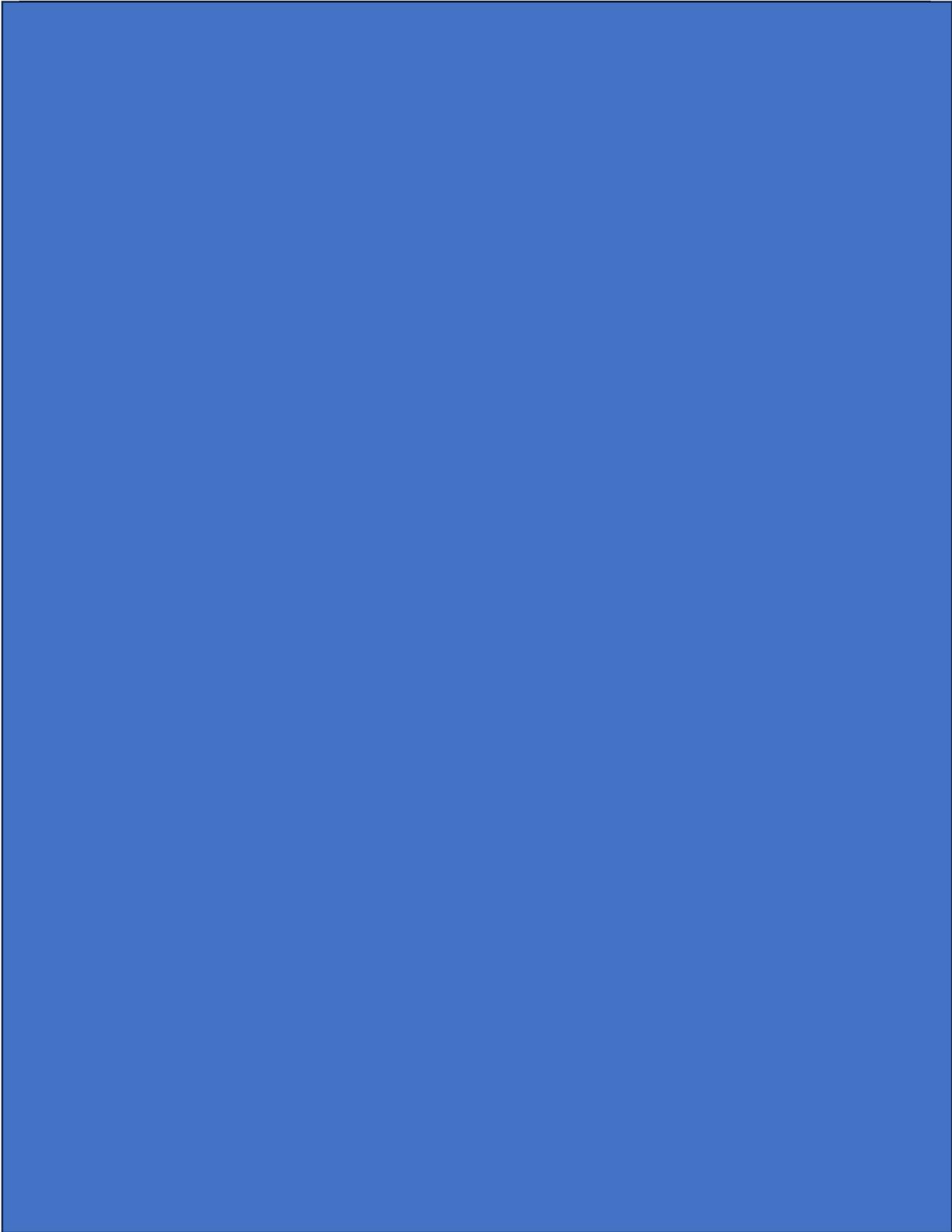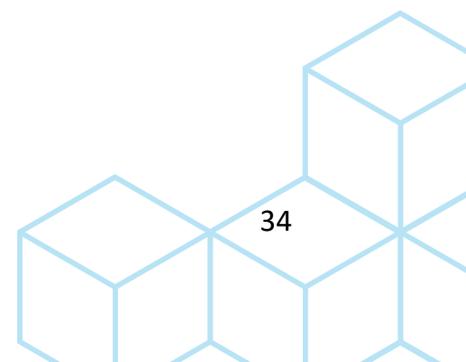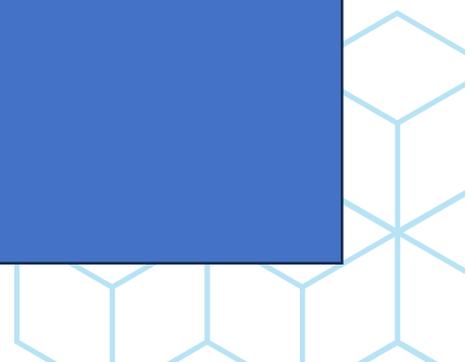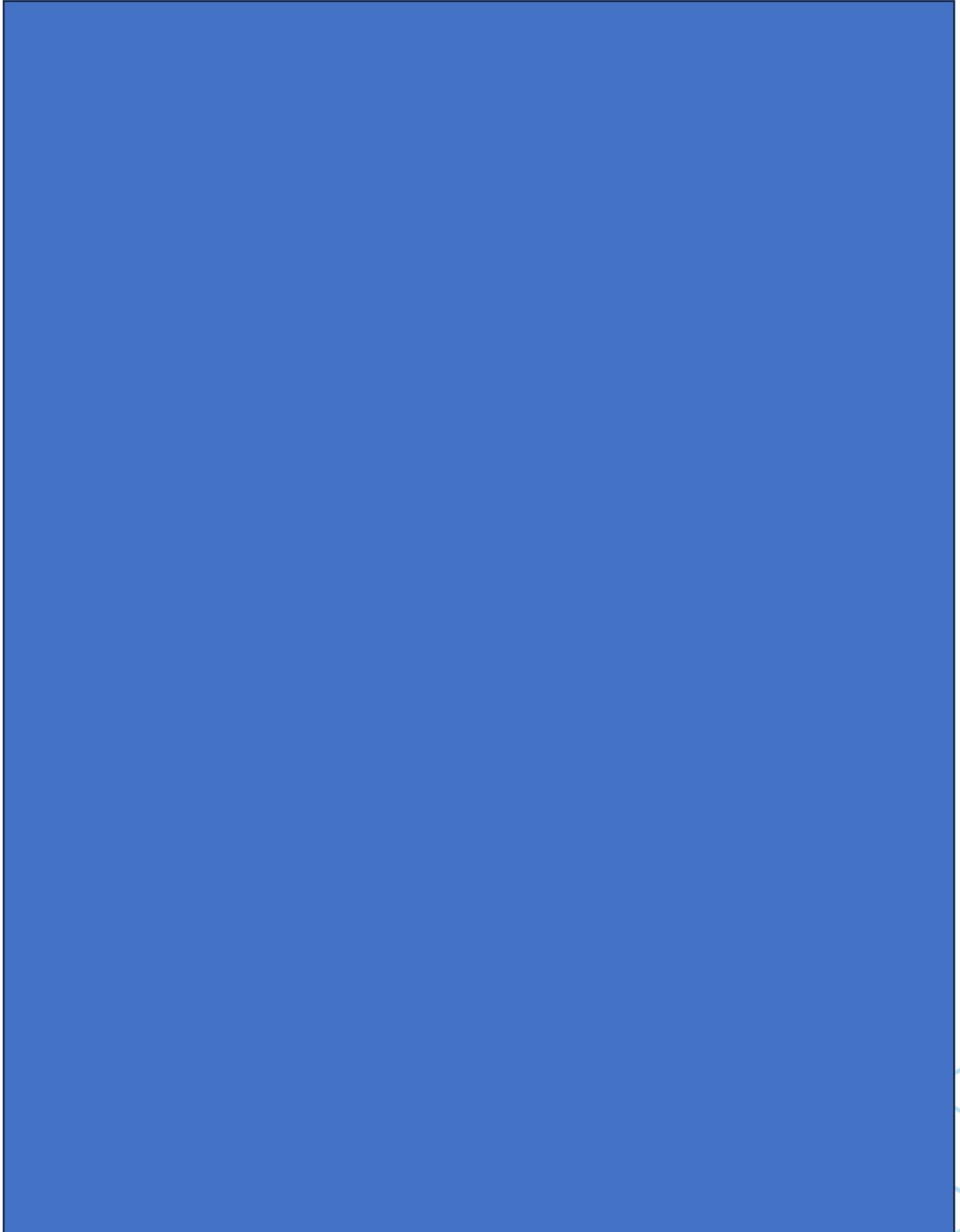**Project Measurements:**

*Table 2: Vendor Reference #2*
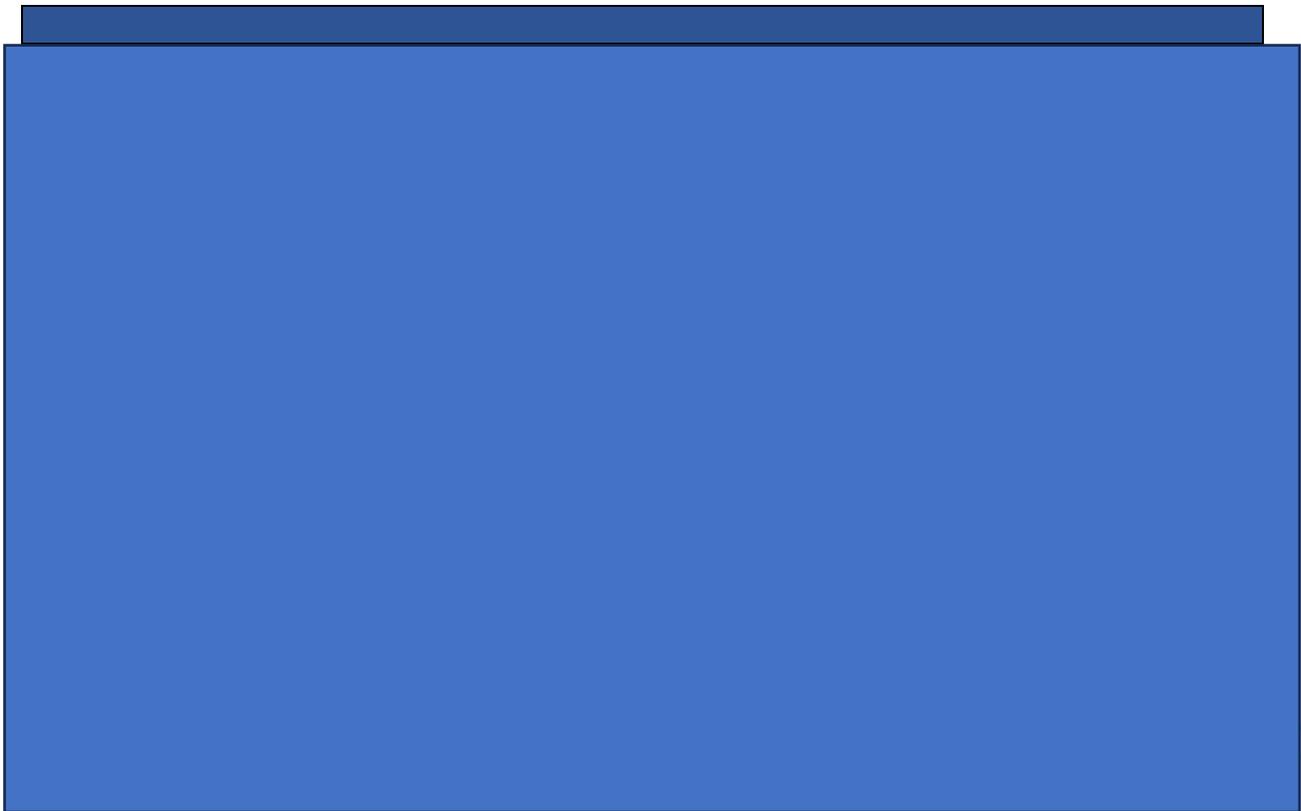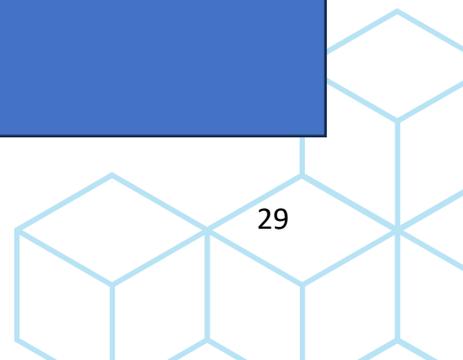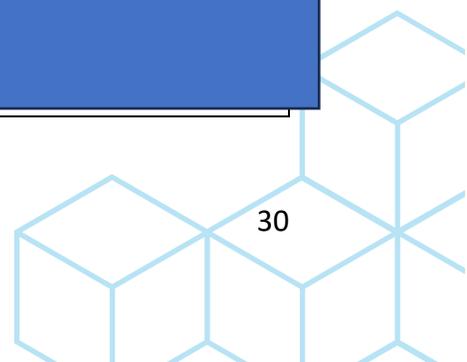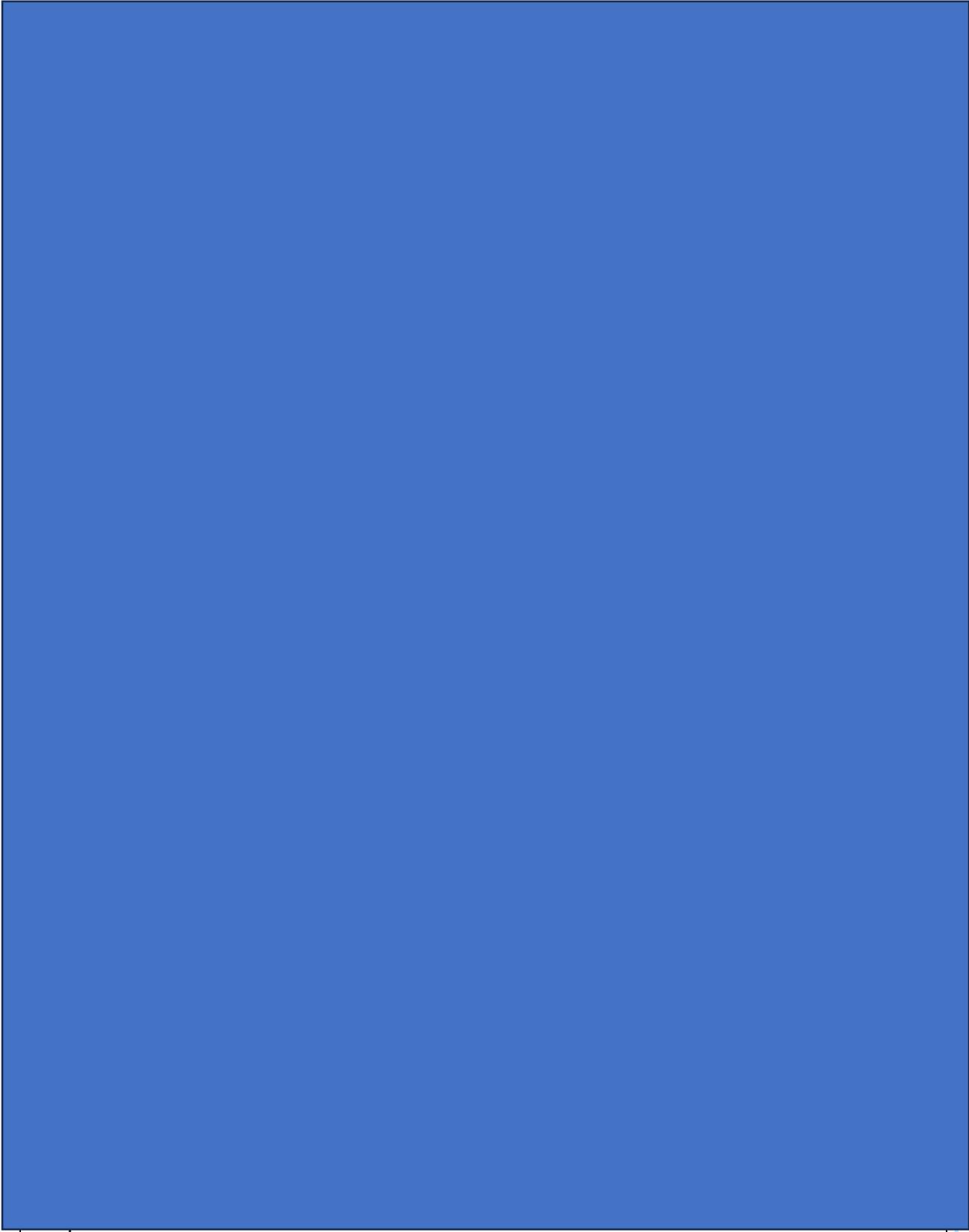
*Table 5: Vendor Reference #3*
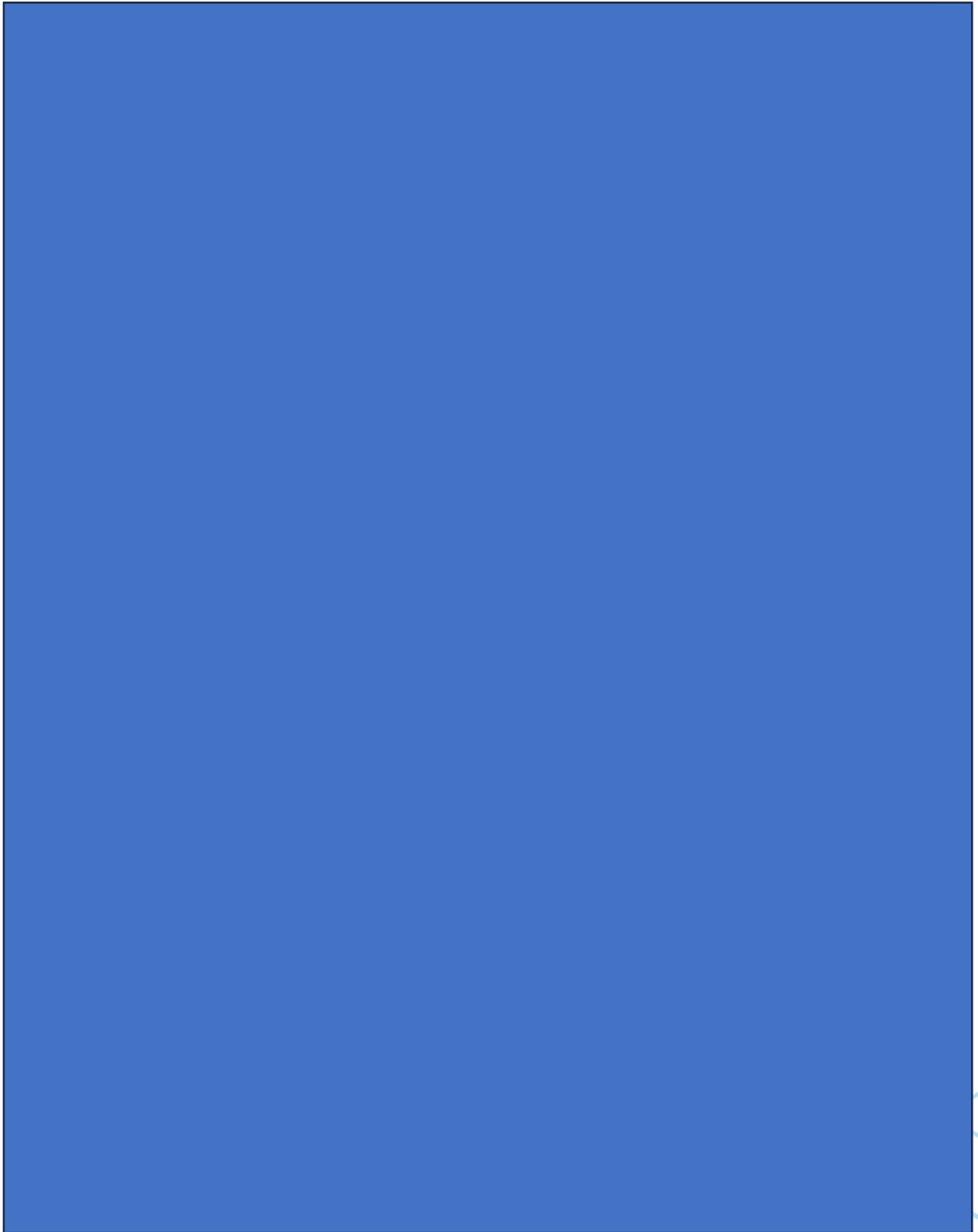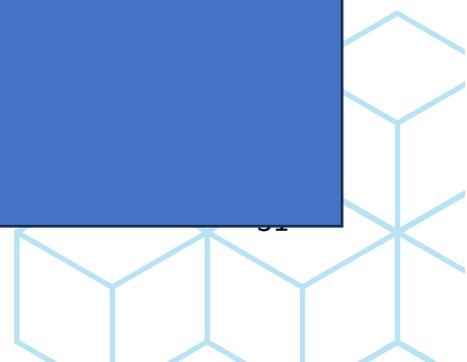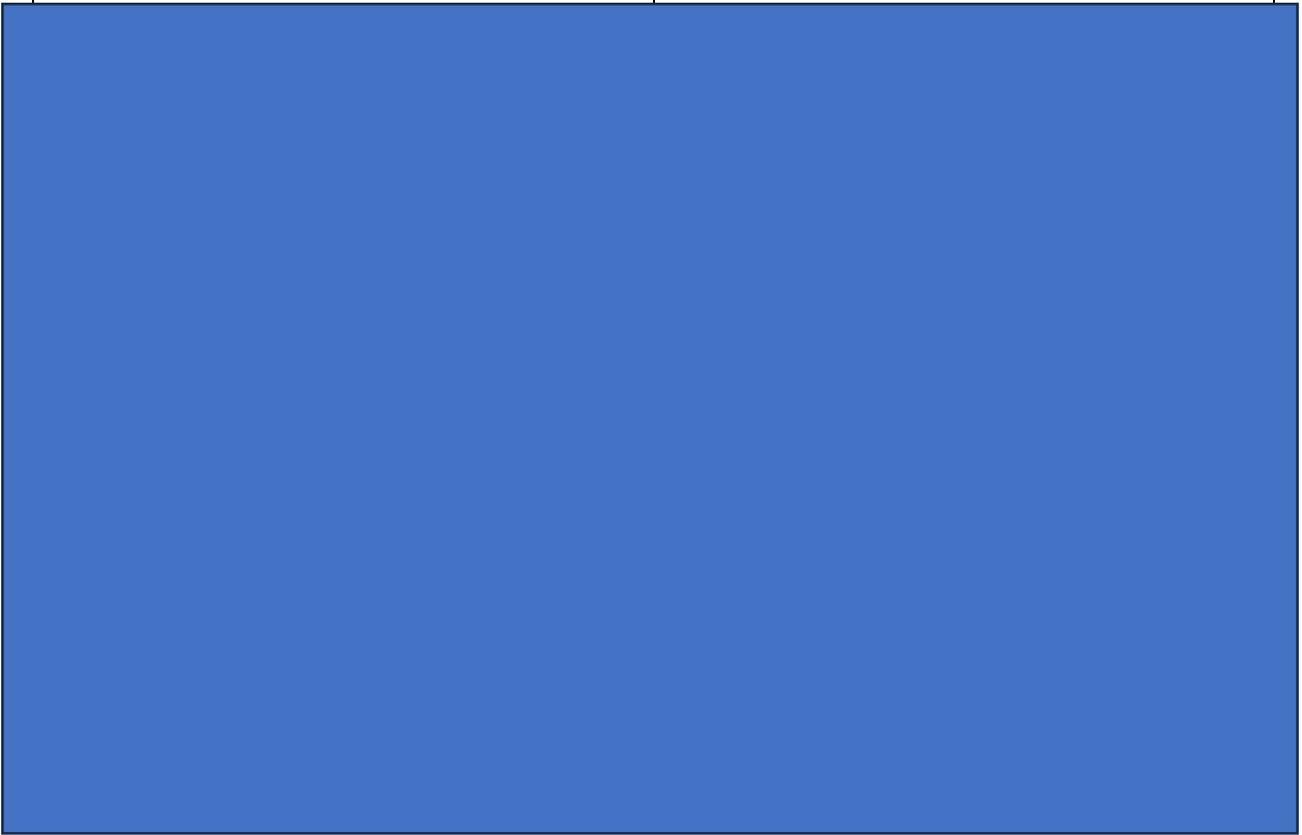
**Table 6: Vendor Reference #4**

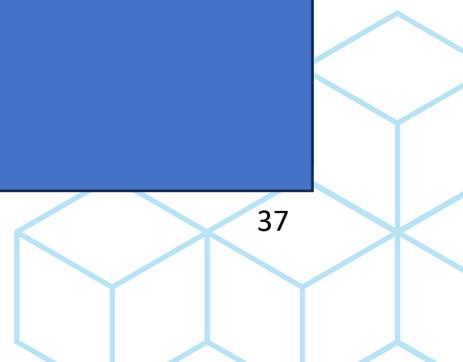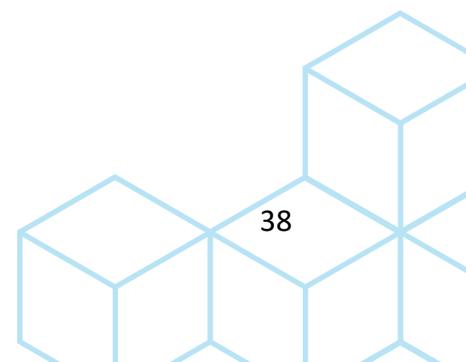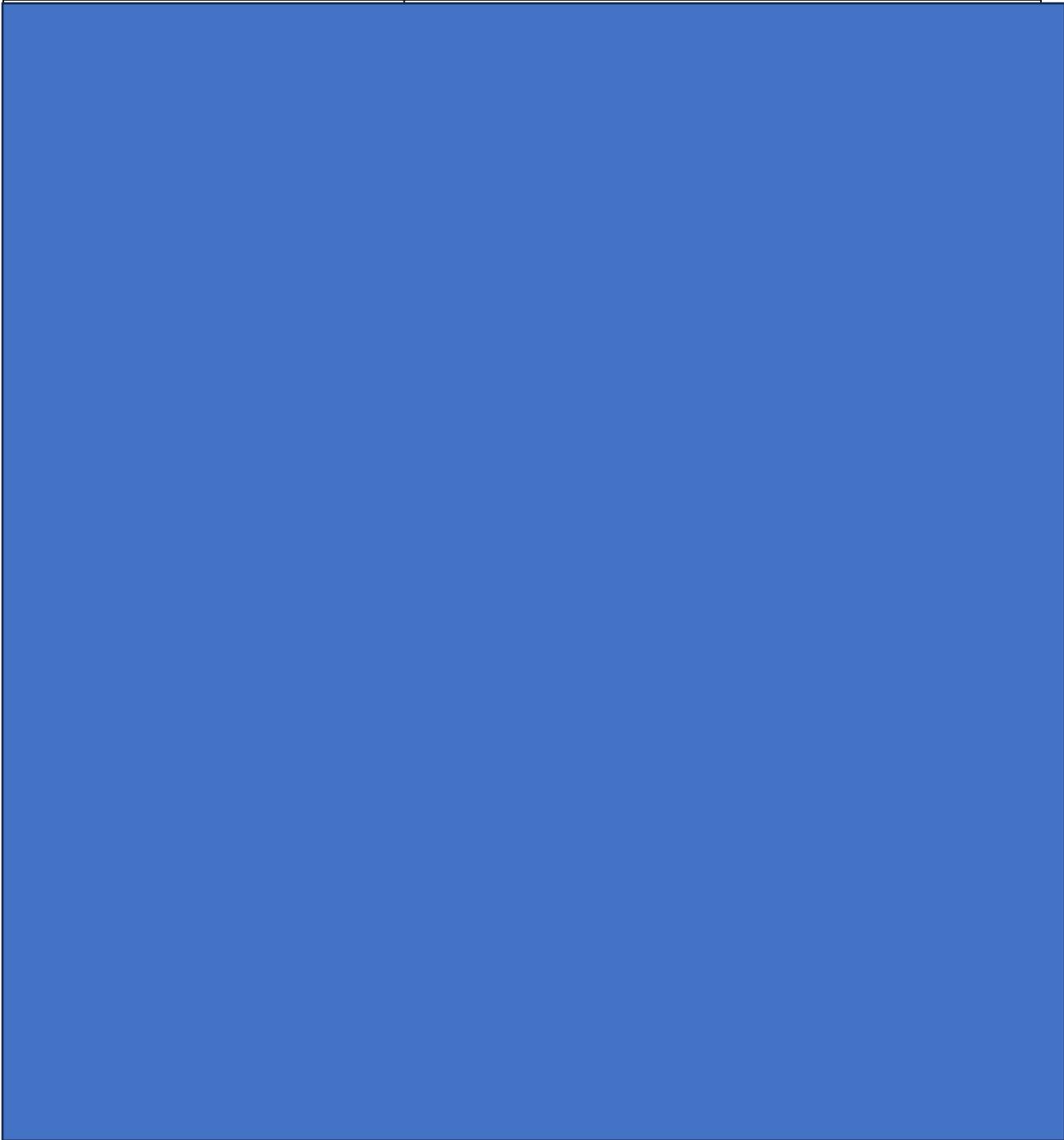| |
|---|
| If the vendor performed the work as a Subcontractor, the vendor should describe the scope of subcontracted activities: |
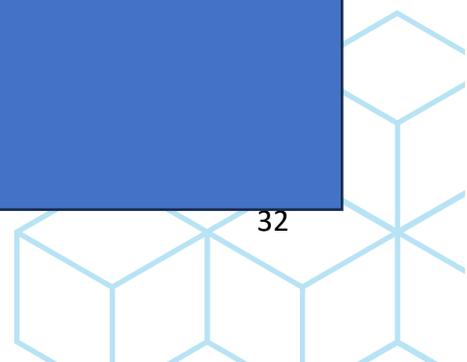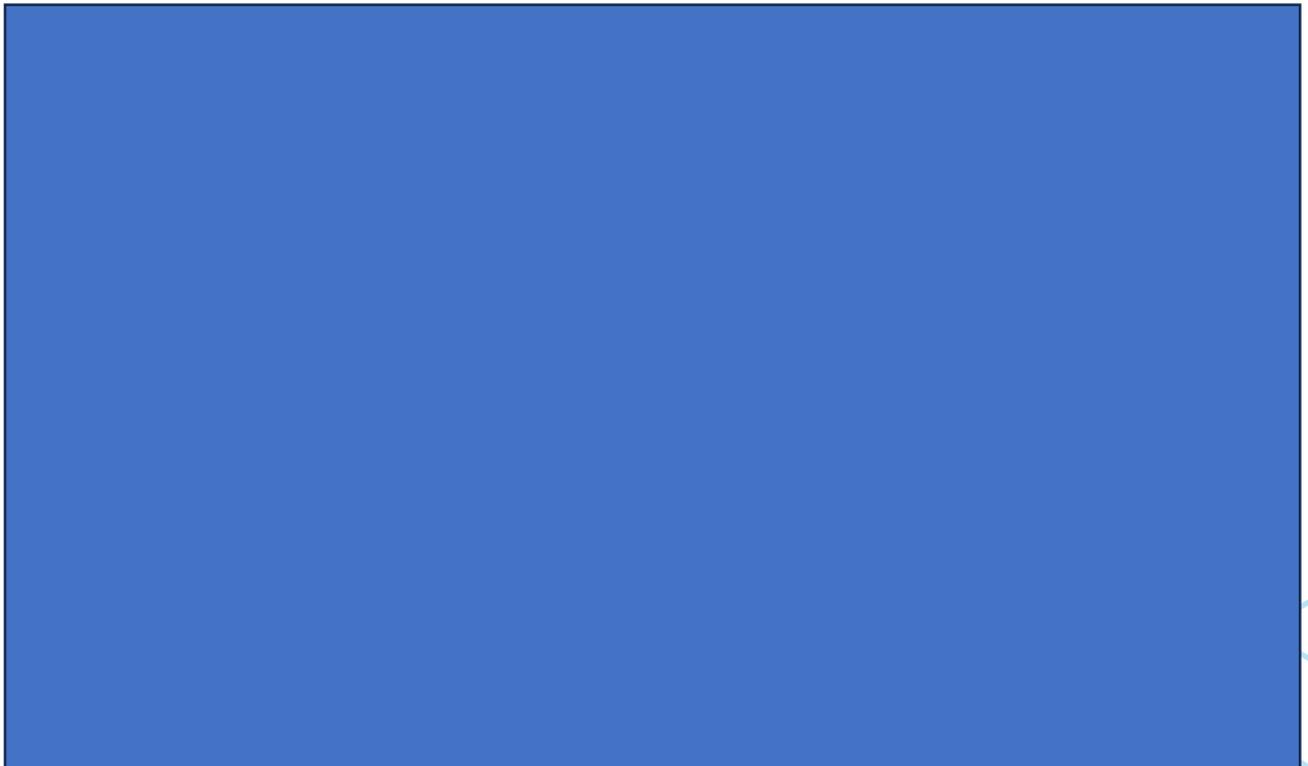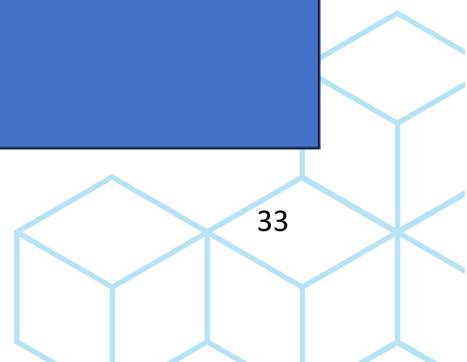
*Table 8: Subcontractor Reference #2*
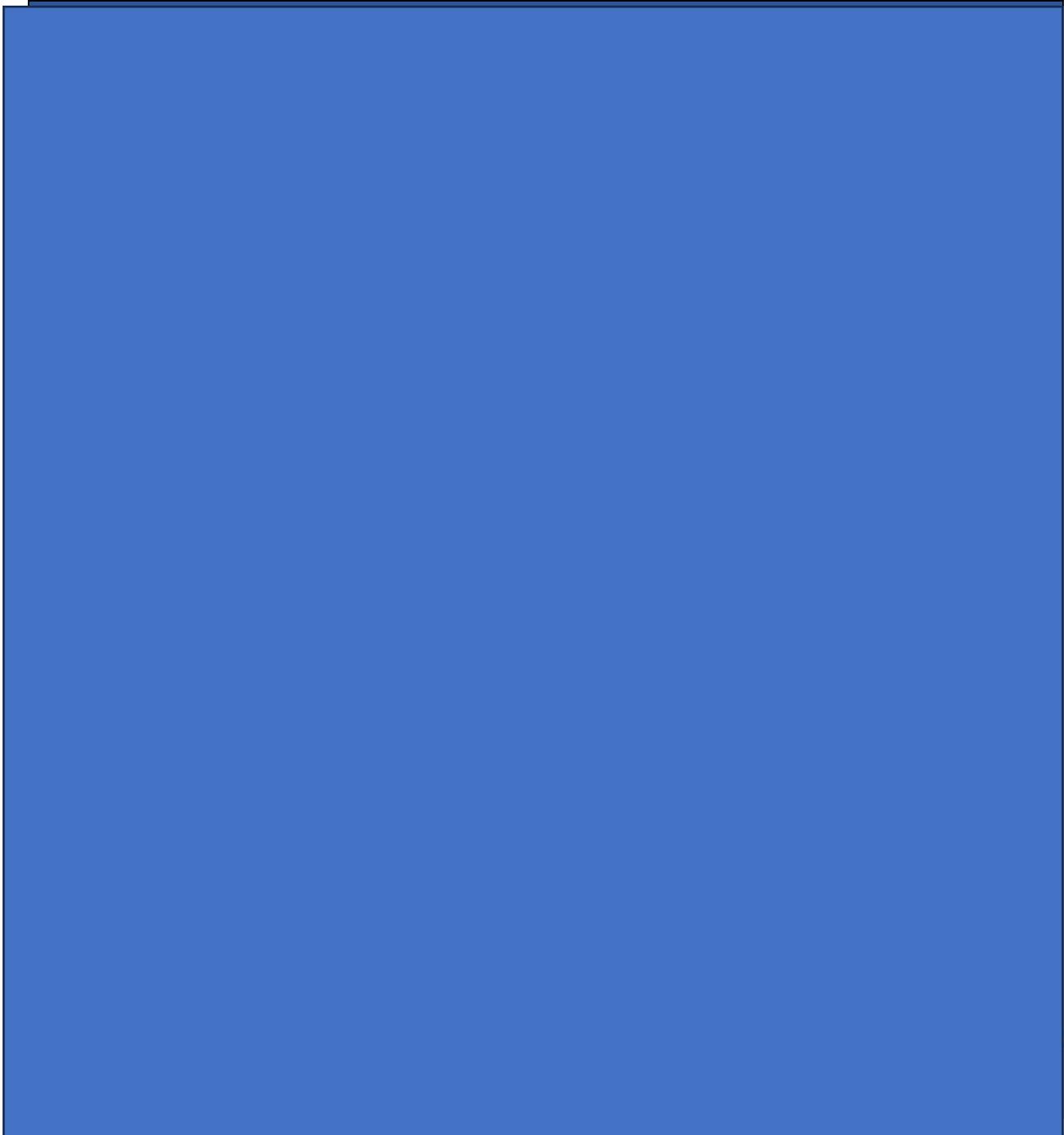
## KNOWLEDGE OF PUERTO RICO HEALTH CARE LANDSCAPE

V2A's Knowledge of Puerto Rico Healthcare Landscape comes from the work performed by its Healthcare Practice over the years and the combined experience of its members. V2A has developed a geolocation database of all establishments in Puerto Rico, including all providers of medical services by specialty and location. This will facilitate the NEMT gap analysis to understand access gaps between the target population and required medical services. As expressed before, V2A's Healthcare Practice has collaborated with multiple private and public sector healthcare organizations, including payors, providers such as hospitals and medical groups, and regulatory entities. Additionally, as part of its knowledge generation, the Healthcare Practice publishes articles about the sector and the practice frameworks, podcasts where we discuss relevant topics with important actors of the sector, and the Social Determinants of Health for Puerto Rico Dashboard, to offer to the public part of the cumulative information and knowledge the firm manages and monitors. The Analytics Practice publishes the Puerto Rico Economic Dashboard, that summarizes its economic situation through a series of indicators.

The following are links to some of the key Health Care insights published in the last year:

**Insights:**
- Healthcare in Puerto Rico: Challenges and Our Big Opportunity
- Improving the Health of Puerto Rico Hospitals
- Social Determinants of Health: Understanding the Drivers of Health Disparities

**V2A Talks Podcast: Healthcare**
- Una conversación sobre la innovación social para mejorar la equidad en salud
- Una conversación Lic. Humberto Pérez, Director Ejecutivo del Hospital Dr. Susoni

**V2A Dashboard:**
- Social Determinants of Health Dashboard


**Error! Reference source not found.**9 shows snapshot of the SDoH Dashboard, it can be found in V2A website and it is continually updated.

## *Figure 9: Social Determinants of Health for Puerto Rico Dashboard*
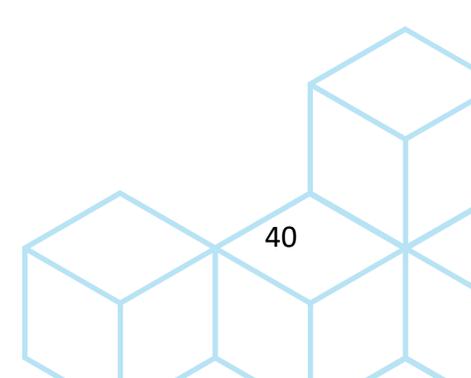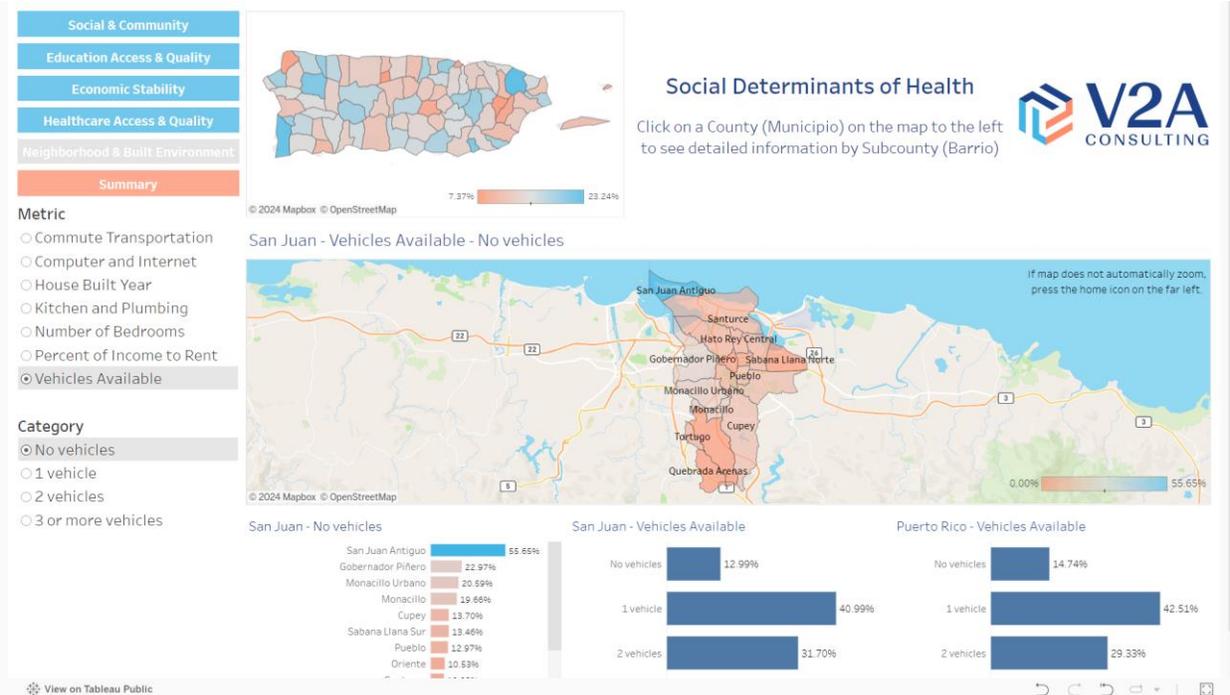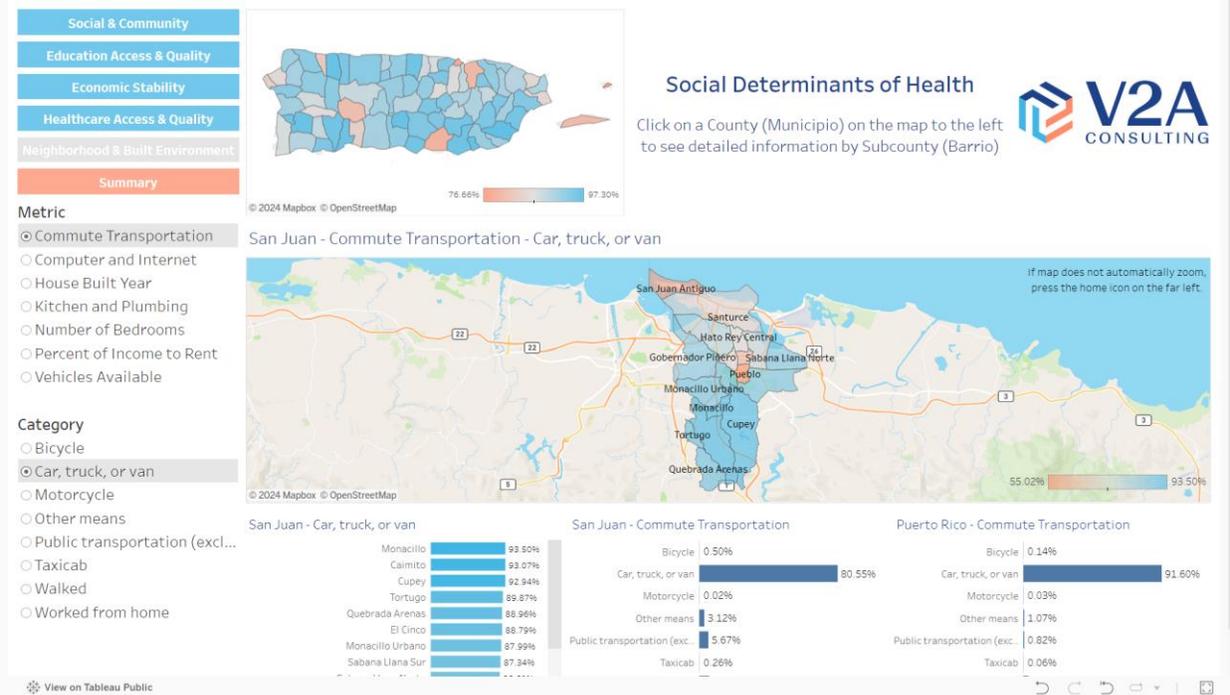
- **Develop project schedule plan.**

Our team will develop the baseline project schedule to ensure all parties have clarity on the schedule for the phases of the project. This plan will guide the interview and focus group design and provide a clear understanding of the expectations for the final report.

- **Conduct research and benchmarking studies.**

Leveraging our V2A SDoH Dashboard. Analyze in detail information on Money Follows the Person (MFP), and Non-Emergency Medical Transportation (NEMT) Services including benchmarking other jurisdictions, current services provided in Puerto Rico and partner agencies, comparing NEMT brokerage models to existing ones in other states. The analysis will focus on:

- Assessing quality and efficiency of transportation services
- Evaluating adequacy of service coverage, ensuring accessibility for patients with diverse needs
- Analyzing transportation data to identify trends, and potential areas to be enhanced and generate reports.
- Identifying potential risks associated with transportation services, ensuring the safety and security of patients during their transit.
- Reviewing of all available modes of transit, including mass transit, municipal and nonprofit on demand transit, ride sharing options, and informal friends and family options.

- **Develop interviews and focus groups methodology and outreach plan.**

We will develop a comprehensive survey administration, execution and analysis plan. The survey methodology will assure randomization, validity and coverage, with an sample size of over 1,000 interviews, ensuring 90% confidence level in responses.

- **Develop interview and focus group questions in English and Spanish.**

We will design up to 6 questionnaires for in person and on the phone interviews, and for the two virtual focus groups we are proposing to complete, targeting a diverse population that includes, elders 60+, adults with disabilities 21+, providers, caregivers, non-profit organizations providing home health services, government agencies and NEMT service providers. The questions will be defined based on the guidance from the provided material, the RFP, the research, and our experience.

- **Administer the survey using multiple methods.**

Our primary method to administer the survey will be by phone, to ensure a convenient access for participants, however this will be complemented with personal phone calls or in-person visits, if feasible, to ensure a higher response rate and data completeness. We will leverage our local team of bilingual field evaluators to ensure culturally sensitive approach. We will establish connections through our extensive network of community leaders, local organizations and other key stakeholders to establish trust and ensure effectiveness of the study. Our proposed team structure contemplates an engagement manager as well as quantitative market research lead, who will be responsible for direct supervision and quality control of the survey responses and administration progress.

- **Perform geospace analysis.**

We will leverage what we have built in the V2A SDoH Dashboard and develop a geospatial database of population, existing NEMT coverage, medical services locations, and other social determinants of health. Existing NEMT coverage may be mapped at the census tract level depending on availability of data. Coverage data will allow for a functionality to be implemented to determine serviceability based on household location (using a ray-casting algorithm). Additionally, this database will enable geospatial analysis to determine NEMT coverage adequacy. The database can be developed in any of the common GIS tools like QGIS or ArcGIS. Leveraging past projects, we already

have the majority of the medical service providers with their geolocation, this will simplify the amount of work needed to determine average distances between the medical services providers and the patient's household. Leveraging the data available in the V2A SDOH Dashboard and the data capture in the database buildout, we intend to be able to determine demographics for the target population at the census tract level, NEMT and Medical services coverage adequacy including travel time analysis, and SDOH care needs.

- **Compile and analyze results.**

We will apply automated methods to compile the responses during the fieldwork phase and allow for easier and standardized manipulation of the data. We will be performing data quality validations to the information coming from the fieldwork, in addition to the checks and quality controls performed as part of the fieldwork per se. After the required data quality, we will implement data cleaning and transformations methods to ensure the information is ready to perform analyses and to be loaded into the selected visualization tool. Our team is well versed in data analysis and has ample experience analyzing healthcare data, performing statistical and geographical analyses. As we progress in the analysis constant communication and findings sharing with the PRDOH project team will be instrumental in ensuring clarity and alignment.

- **Develop charts, graphs, summarize findings and write up process for the final report.**
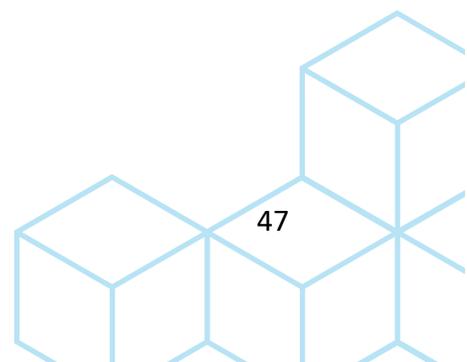
As part of the analysis charts, graphs and other visuals will be developed to help in the extraction of insights and to illustrate findings. The main findings complemented with visuals, recommended actions to address the identified challenges and gaps to be put together in a final report and presentation.
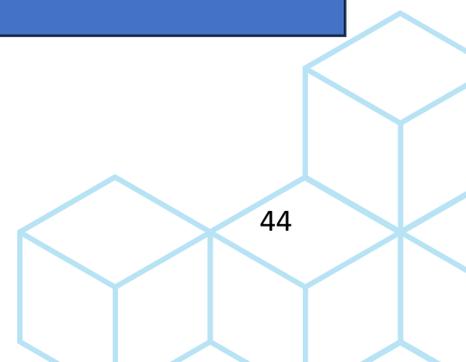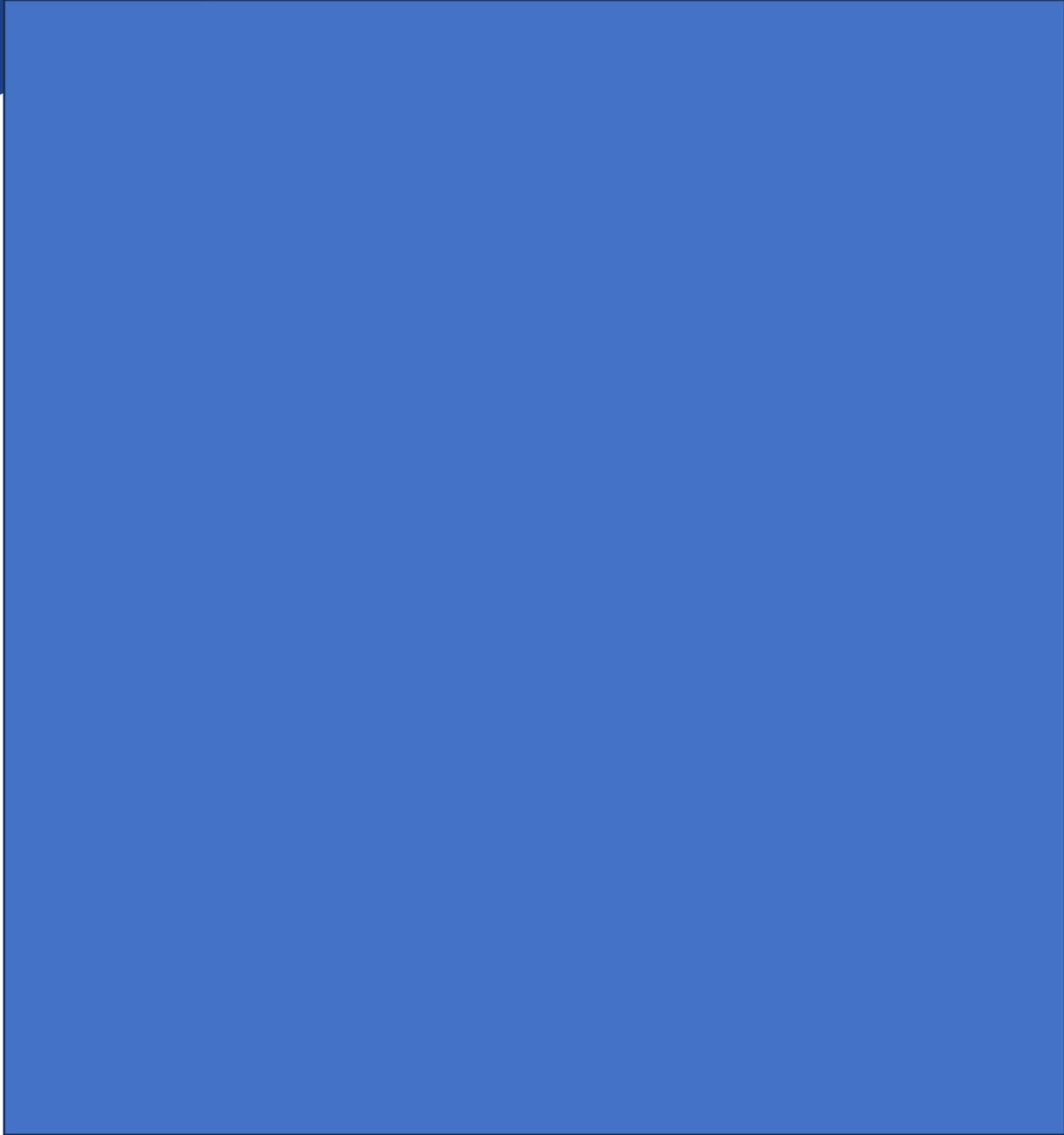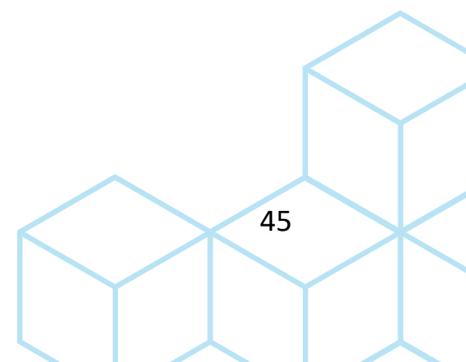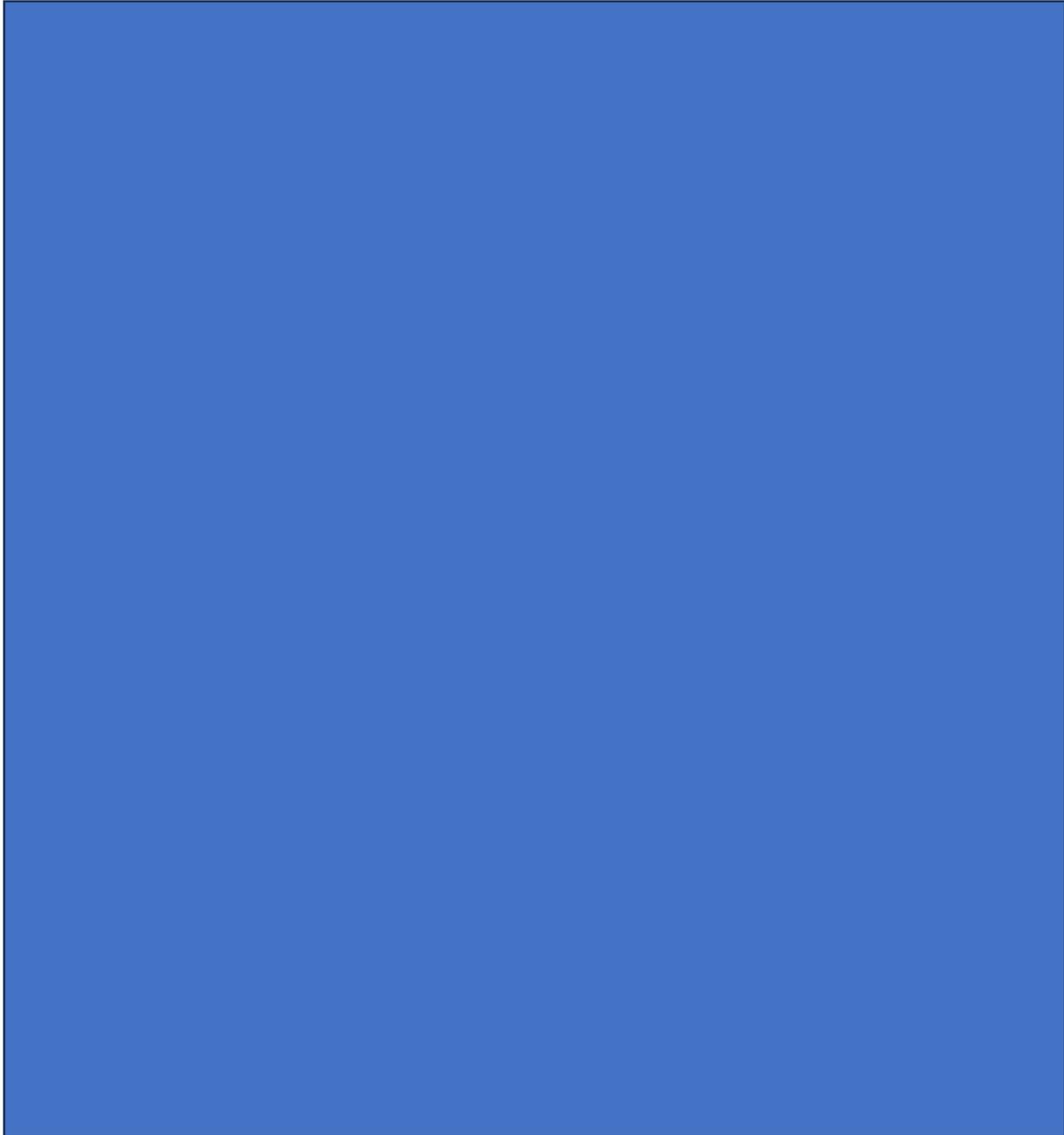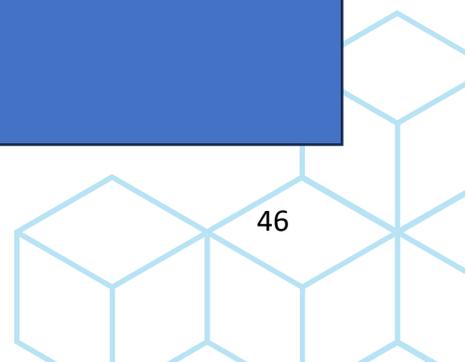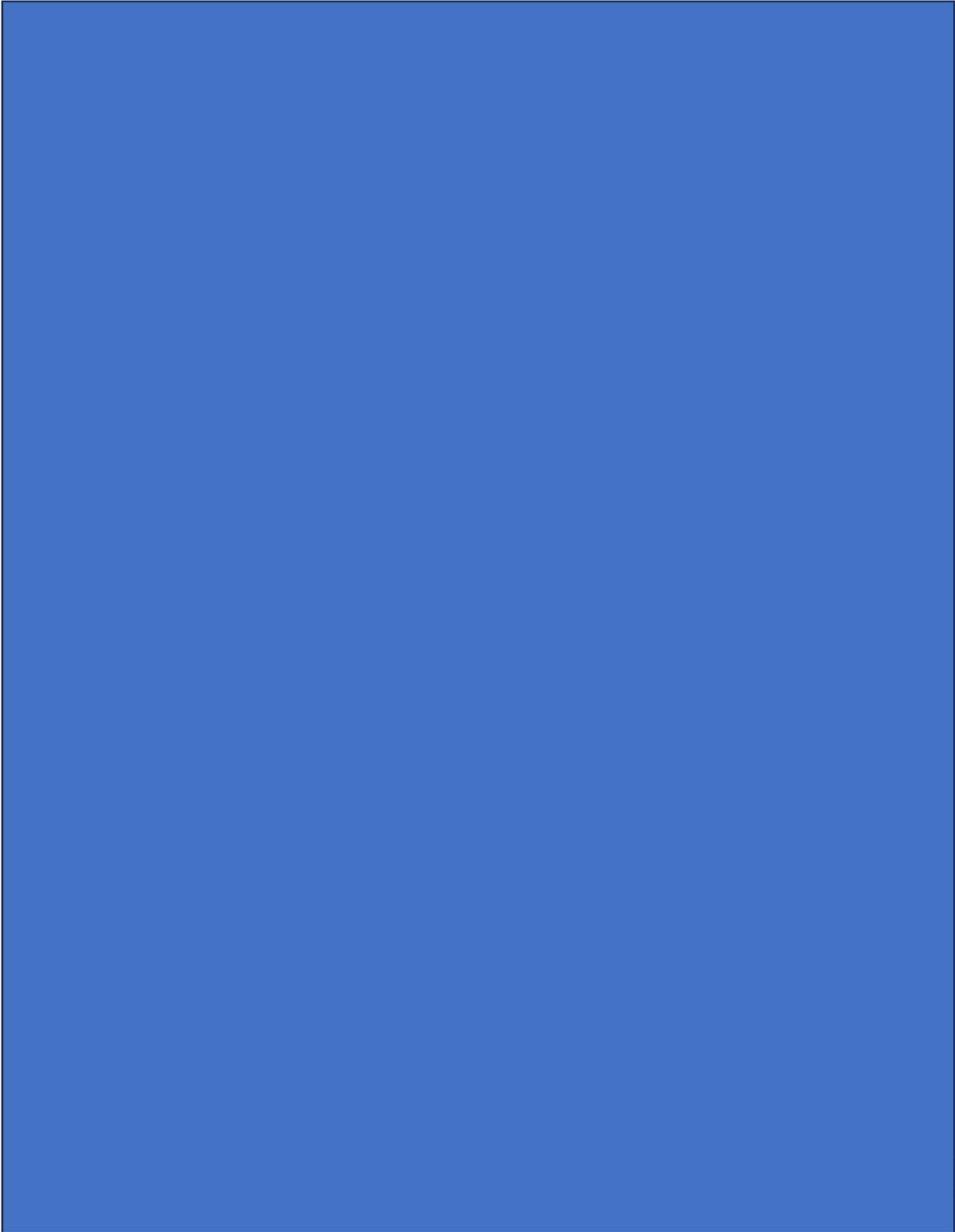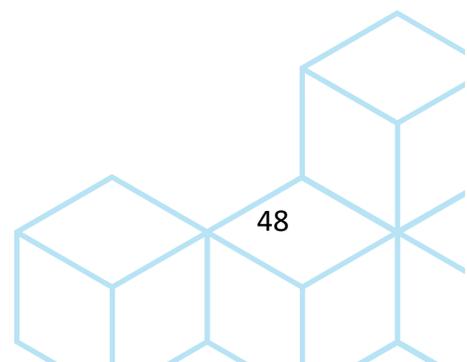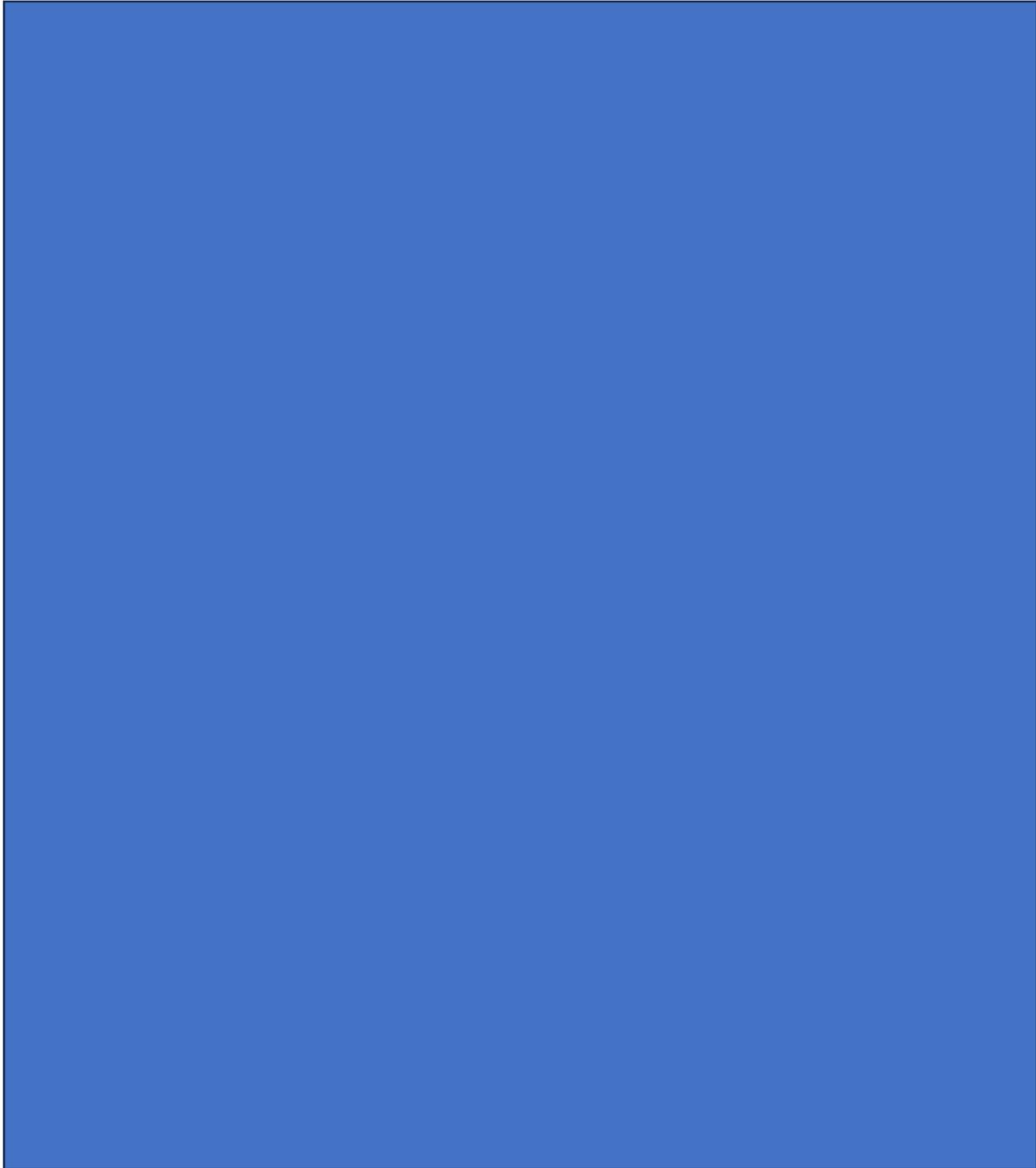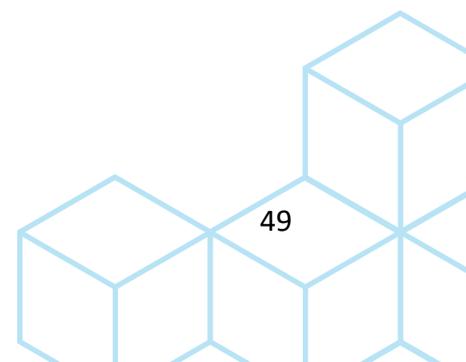
V2A is led by 6 Directors each focused on a professional practice or industry. Under each Director's supervision can be one or more Engagement Teams, depending on the active engagements. As can be seen in the chart below, some of the Directors also supervise functional teams of the firm such as Finances & Administration, IT Infrastructure and Marketing.

Engagement Teams are assembled depending on the project requirements and will typically have 1 Engagement Manager and 1 or 2 consultants. Additionally, Senior Engagement Managers may assist the Director in supervising these teams. Our current consulting staff is the following:

- Senior Engagement Manager – 3 (Full-Time)
- Engagement Manager – 11 (8 Full-Time & 3 Contractors)
- Senior Associate – 6 (Full-Time)
- Associate – 18 (14 Full-Time & 4 Contractors)
- Business Analyst – 11 (Full-Time)

The Analytics Practice has a dedicated team of technical consultants, which may work full time in analytics projects and/or collaborate in engagement teams with analytics components in a full- or partial-time basis, working on the required analytics workstreams. The analytics consultants are supervised by our Analytics Manager and under the leadership of the Practice Lead and Director Xavier Diví. Our Analytics Practice staff is the following:

- Analytics Manager – 1 (Full-Time)
- Senior Data Scientist – 2 (Full-Time)

- Data Scientist – 3 (2 Full-Time & 1 Contractor)

- Data Engineer – 1 (Full-Time)

- Data Analyst – 3 (Full-Time)

*Figure 1: V2A Organizational Chart*
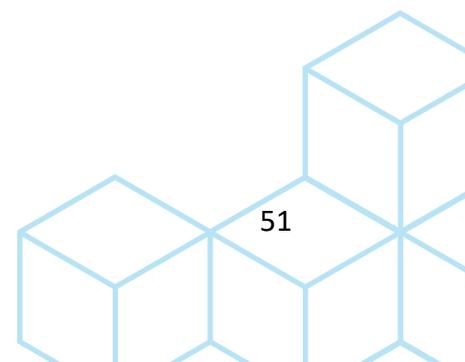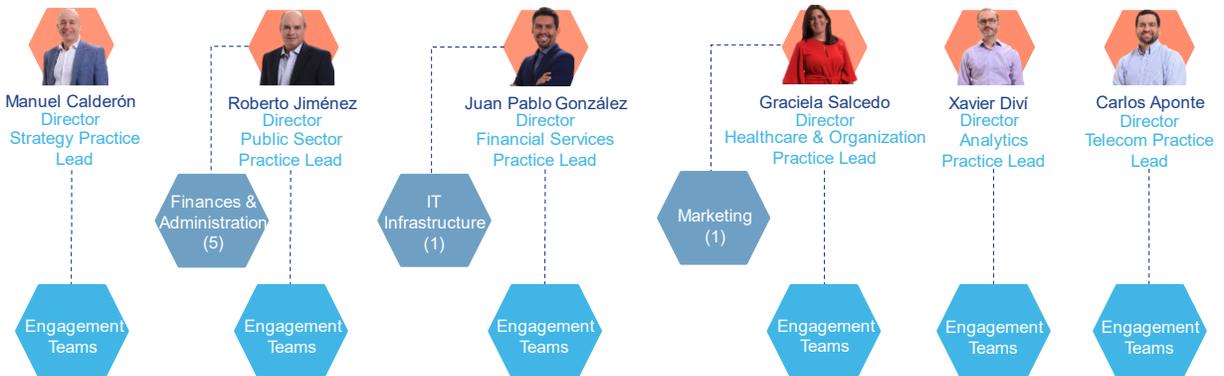
Page left blank; qualifications attached in following pages

# Graciela Salcedo Canto
## DIRECTOR

## Overview

Managing Director with more than 20 years of experience in a wide range of areas of brand management, project management, process improvement and strategic planning.

## Skills/Certifications

- Fluent in Spanish and English, proficient in French
- Certified Scrum Product Owner
- President of the Board of Directors of Juan Domingo en Acción, a non-profit community organization
- Penn Interviewing Member

## Professional Experience

### V2A Consulting | 2006 – present
Director, San Juan, PR

- Leads the firm's Health Care practice. Led a five-year relationship with the leading managed care organization in Puerto Rico. Specifically, led the creation of a strategic PMO for the company and oversaw the implementation progress of all initiatives.
- Extensive experience leading strategic planning processes for multiple clients in the banking, insurance, retail, CPG and non-profit sectors, including: the largest Medicare Advantage, health, life, property and casualty insurance conglomerate in PR with $2.4 billion in revenue; a local food distributor with 100 years of history and $290 million in revenue; the main importer and distributor of sugar in PR with more than $115M in revenue; a Venezuelan multinational bank entering the public relations market; and a retail business with design, sales and export operations in PR and Venezuela with more than $50 million in revenue.
- Led a team to facilitate a digital transformation journey within the Operations division at the largest bank in Puerto Rico, including mapping operational processes, integrating various departments, and facilitating a cultural transformation.
- Led a client reengineering team to identify close to $4M in process efficiency opportunities from the implementation of a common lending platform in commercial and consumer credit operations of the main bank in Puerto Rico (more than $35 million in assets).
- Led a team of five consultants to carry out an in-depth diagnosis of several government agencies with a budget of $394 million under the Secretariat of Economic Development that led to multiple efficiency improvement measures and an organizational restructuring recommendation.
- Developed a profit improvement program for a local mortgage bank and retail bank, including branch performance monitoring systems, cost reduction and productivity improvement recommendations, process documentation, and strategic communications.

## Other experiences
### Procter &Gamble | 1999-2006
Brand Manager, San Juan, PR

### Xerox Corporation | 1994-1999
Technical Program Manager, Rochester, NY

## Education

2019 | Harvard Business School
Leading Professional Services Firms; Cambridge, MA

1998 | Rochester Institute of Technology
Máster of Engineering in Industrial Engineering; Rochester, NY

1994 | University of Pennsylvania
BS in Mechanical Engineering; Philadelphia, PA

## Xavier Diví
**DIRECTOR**

## Overview

Xavier Diví has more than 15 years of experience in various financial and economic development areas. Xavier currently manages most of the content development for our knowledge-sharing publications.

## Certifications / Skills

- Experience in managing investment optimization processes in structured corporate environments and in the development of analytical tools to improve financial decision making.
- Native of Spain. Fluet in Spanish, Catalan and English.
- Financial management
- Strategic planning
- Investment Optimization
- Business Analysis

## Professional Experience

### V2A Consulting | 2010 – present

**Senior Engagement Manager,** San Juan, PR

- Managed, with the largest bank in Puerto Rico (46% share in deposits, $29B in assets), to calculate the profitability of the banks' clients through the lines of business (mortgages, automobiles, credit cards, personal loans, commercial, deposits, insurance and securities). Developed a set of "quick win" initiatives and long-term strategic initiatives based on customer outcomes and findings along with product profitability.
- Worked on a project for the same bank to increase the productivity of the commercial credit unit by redesigning its loan origination processes and managed the redesign of the bank's commercial and construction appraisal application and review processes.
- Led the development of a three-year financial plan for a Dominican Republic bank to increase its single-digit ROE to the 25%-30% range and position it among the five local banks with the highest total assets.
- Worked on the design and implementation of a restructuring plan in three government agencies in Puerto Rico to maintain basic public services with a 30% reduction in the workforce. Expected reengineering savings to be included in the budget process of the Commonwealth of Puerto Rico.
- Created quarterly reports of the banking industry in Puerto Rico and the Dominican Republic. These reports include analyses of profitability, asset quality, and, capital adequacy and productivity. Supervised quarterly updates of reports.

### American Express Travel Related Services Inc. | 2007-2009

**Director/Chief Financial Officerfor Puerto Rico and the Caribbean,** San Juan, PR

- Led budgeting, forecasting, investment optimization and strategic planning for the establishment and consumer card services markets in Puerto Rico and the Caribbean, which generated $5.3 billion in billed business; $255 million in RA; $115 million in revenue; and $22 million in net income.
- Promotion of investment reduction process to achieve financial objectives.
- Updated the International Chief Financial Officer's team on the month-end results for Puerto Rico and the Caribbean, as well as on the risks and opportunities to achieve the plan and planned objectives.
- Built business cases to gain additional resources and take advantage of new growth opportunities.

## Education

1999 | Escuela Superior de Administración y Dirección de Empresas (ESADE)
BS in Business Administration and Master of Business Administration, concentration in Finance, Barcelona, Spain

# Coral Frederique
## ENGAGEMENT MANAGER

## Overview

Engagement manager and experienced finance professional with a demonstrated history of working in the management consulting industry. Skilled in healthcare, pharmacy benefit management, rebates, underwriting, government debt restructuring, and financial modeling. Strong business development professional with a bachelor's focused in Accounting and Finance from the University of Puerto Rico.

## Certifications/ Skills

- Strong at networking, and building/managing relationships.
- Proficient in project management, financial modeling, and strategic planning.

## Professional Experience

### V2A Consulting | 2022– present
Engagement Manager, San Juan, PR

- Support multiple engagements, and business development efforts as well as facilitate client relations in the healthcare, public, and consumer goods sectors.
- Collaborate as one of the firm's leaders in the Healthcare practice in the creation and publication of content and insights.
- Spearheaded the development of comprehensive financial modeling as well as facilitate the strategic business strategic planning for a leading food manufacturer and consumer distribution company in Puerto Rico.
- Established a comprehensive PMO framework and provided project management support to a top local MCO to ensure the successful completion of the Vital proposal.
- Headed a team of 2 in the development of an economic development strategic plan for the Puerto Rico Economic Development Department

### Abarca Health V2A | 2018– 2022
Senior Manager, Rebate Operations and Underwriting, San Juan, PR

- Led the fast development and establishment of a new division within the organization that had over $800M in incremental annual rebates under management and brought over $50M in incremental revenue to the organization in 2021.
- Oversaw a team of 5 direct reports in the ongoing operations for rebate aggregation services, which included 3 main areas: 1) client account management, 2) formulary management, and 3) rebate billing operations.
- Headed the design, release, evaluation, negotiation, selection, and contract execution of the organization's RFP to pick our rebate aggregation partner through a competitive bid process.
- Co-Designed, pitched and eventually piloted and implemented with one of the biggest health plan clients a new financial model branded as Assura™ to share risk in the problem of drug pricing variably and inflation.

## Other experiences

### Puerto Rico Fiscal Agency And Financial Advisory Authority (AAFAF) | 2017-2018
Associate of Financial Restructuring, San Juan, PR

### V2A Consulting | 2015-2017
Analyst and Associate, San Juan, PR

## Education

2010-2014 | University of Puerto Rico, Río Piedras Campus
BS – Business Administration, Finance and Accounting

# Jose Pablo Perez

**ANALYTICS MANAGER**

## Overview

Jose Pablo is an Analytics manager at V2A. He has had experience in the financial services and healthcare sectors. In financial services, he has been involved in Lean transformations, profit improvement and client clustering/segmentation projects. Within healthcare, he has experience in strategic, operations and organizational driven projects.

## Certifications/ Skills

- Process Optimization
- Organizational Development
- Lean Methodology
- Market research and Intelligence
- Financial Analysis

## Professional Experience

### V2A Consulting | 2017– present

**Analytics Manager, San Juan, PR**

- Managed a project to standardize Puerto Rican addresses, geolocate them, and determine coverage of these locations within a Puerto Rican telecom provider.
- Performed a client profitability analysis and segmentation of a leading Dominican banking institution to improve cross-selling among highly profitable clients and enhanced the institution's reporting tools to provide better visibility and performance management.
- Planned the strategic project in one of Puerto Rico's biggest health insurance providers that led to an increase of 16% in membership of one line of business.
- Developed a framework to segment and analyze Puerto Rico by micro-markets to optimize the branch network of one of its financial institutions. The use of this framework led to estimated savings of $20MM.
- Diagnosed, designed, and implemented the LEAN transformation of the Loss Mitigation Department of one of Puerto Rico's financial institutions, which reduced lead times by 70%, increased service level by 200%, reduced quarterly regulatory findings by 100%, and led to savings of $1MM.
- Implemented the LEAN transformation of the Dealer Services Division and Underwriting Division of an auto financier, which increased collections efficiency by 20% and increased risk visibility in the Dealer Services Division; and reduced lead times by 40%, increased service level by 25%, and generated savings of $700K in the Underwriting Division.

## Other experience

### E3 Consulting | 2016-2017

**Manager, San Juan, PR**

- Managed the business process documentation, redesign, and improvement of one of Puerto Rico's leading transportation services.
- Managed the assessment of the implementation of a data warehouse in one of Puerto Rico's biggest health insurance providers.

## Education

2021 | Quantic School of Business and Technology
**Masters of Business Administration**

2011 | Massachusetts Institute of Technology
**Masters of Nuclear Science and Engineering**; Cambridge, MA

2010 | Massachusetts Institute of Technology
**Bachelors;** Cambridge, MA

# Elvis Torres

**DATA ENGINEER**

## Overview

Data Engineer with several years of experience with ETL processes, data analysis and visualizations. Experienced with coding languages and structured data applications.

## Certifications/ Skills

- Data visualization and dashboard creation in Power BI, Tableau and SAP Analytics Cloud
- ETL process in Python
- Experienced with structured database applications: MySQL, Impala
- Data Visualization with Tableau Certification

## Professional Experience

### V2A Consulting | 2022– present

**Data Engineer (2023 – present),** San Juan, PR

- Developed scalable ETL processes for creating and maintaining databases for dashboards.
- Performed data analysis to support business decisions and identify trends in client's data sets.

**Data Analyst (2022-2023),** San Juan, PR

- Supported existing firm dashboards in the economy and healthcare sector using Power BI.
- Created an ETL process and created a Social Determinants of Health dashboard in Tableau.
- Data analysis and visualization for clients using Power BI and SAP Analytics Cloud.

### University of Puerto Rico | 2019– 2022

**Scientific Instrumentation Specialist,** San Juan, PR

- Responsible for the proper functioning and data quality of several real-time measuring equipment.
- In charge of field sampling stations.
- Performed chemical analysis of air particles, rain and cloud water samples.
- Handled and analyzed data for scientific publications.
- Presented research findings and prepared scientific manuscripts for publication.
- Developed Python codes to monitor equipment's performance, store and visualize data.
- Supervised undergraduate and graduate students.

## Education

2020 | University of Puerto Rico, Río Piedras Campus
**PhD – Environmental Science**

2013 | Unversity of Puerto Rico, Río Piedras Campus
**BS - Chemistry**

# Alexandra Suárez Carlo

Alexandra Suárez Carlo is the Founder of Lateral Strategy. She graduated from Cornell University and pursued an MBA with a concentration on Consumer Behavior from ESADE University in Barcelona.

With over 20 years of experience in Market Research and Brand Strategy, Alexandra has developed a unique research philosophy: tackle every project with the intention to uncover insights that lead to innovation, always seeking to understand the HUMAN behind the client or consumer. A strategist at heart, Alexandra dissects issues from various angles to unearth actionable insights.

Alexandra has used research techniques to uncover insights and facilitate innovation development for Fortune 500 companies. In Puerto Rico, she has specialized in insight hunting for the healthcare industry, helping a variety of customers develop solutions for patients. Some of her customers include payors Triple S, MMM, and Abarca, pharmacy networks like Alivia Health, pharmaceutical companies like Bristol Myers Squibb, hospitals Auxilio Mutuo and Hospital La Concepción, and the American Kidney Fund patient organization.

Alexandra is certified to teach innovation frameworks including Creative Problem Solving, Design Thinking and Synectics.

When not working, she spends most of her time educating others (from teachers to her two kids) on the power of growth and creative mindsets.

On a personal level, she describes herself as an optimist who believes creativity can change the world.

# Natacha Suárez Carlo

Natacha Suárez Carlo is a top business leader with over 25 years of experience in the areas of Strategic Planning & Operations, Sales & Marketing, Marketing Research and Analytics, Business Improvement, and People Management and Development within the Bio-Pharmaceutical and Healthcare Industry.

As an expert planner, Natacha has directed Strategic and Operating Planning Processes, aligning product plans and operational processes, conducting capability and capacity assessments, and allocating company resources to efficiently support people, product and patient strategies.

Some notable projects managed by Natacha have been:

- Stakeholder mapping Puerto Rico's dynamic payor system for the Puerto Rico Pharmaceutical Industry Association (PIA)
- Developing insight-based-strategies to increase vaccination rates among adults in the United States and Puerto Rico, in collaboration with the Centers for Disease Control
- Conducting market and forecasts for multiple product launches in therapeutic areas such as: hematology-oncology, respiratory, rheumatology, gastroenterology, endocrine, dermatology, and transplant disease states.
- Implementing workforce engagement surveys to increase job satisfaction and retention among various organizations, as well as developing plans to address engagement opportunities.

Most recently, Natacha transformed Puerto Rico's largest specialty pharmacy to leadership position by developing state of the art clinical programs, negotiating key payor contracts, and right sizing and developing its workforce.

She now works with Lateral Strategy as its main Business Partner, focusing on healthcare projects.

Natacha lives in San Juan with her husband and two teenage children. She enjoys running, hiking, and sailing, and is an avid reader of fiction in her spare time.

# Marie Quintero

Marie Quintero is a seasoned marketing research professional with a proven track record in managing and executing qualitative and quantitative research projects.

Marie is also an expert in the healthcare industry. She is the main research provider for multinational bio-pharmaceutical companies based in Puerto Rico and Latin America. She has successfully designed and implemented research initiatives involving stakeholders such as physicians, healthcare providers, payers, and patients. She is experienced in leading complex marketing research engagements and projects.

She has also collaborated with large human resources research companies, optimizing questionnaire design and data processing using customized tools.

Marie founded MQA MARKET RESEARCH INC. a Miami-based full-service marketing research operation, servicing Latin America, the Caribbean, and U.S. markets. She extensively collaborates with Puerto Rico-based research companies to maintain high client satisfaction and quality standards.

Marie brings extensive knowledge, strategic insights, and a customer-centric approach to research.

Marie has received various honors and awards throughout her career, including being distinguished among the Women Who Lead in 2011 by Caribbean Business and receiving the KMR Employee of the Year Award global recognition (2006)
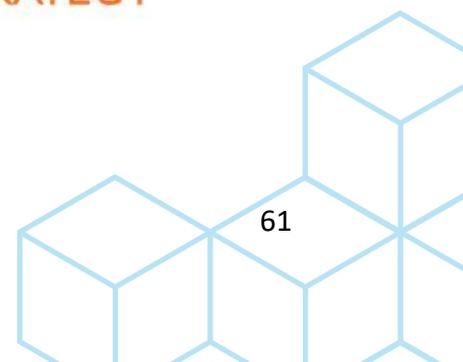
**APPENDIX 5**:  QUALIFICATION

CERTIFICATES

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# V2A CONSULTING

### TURNING YOUR VISION INTO ACTION

## LATERAL STRATEGY

### DEPARTAMENTO DE SALUD

**644 Ave. Fernández Juncos Suite 401**
**San Juan, PR 00907**

**Tel: 787.919.7303**

**E-mail: info@v2aconsulting.com**