



Puerto Rico Medicaid Enterprise System (MES)

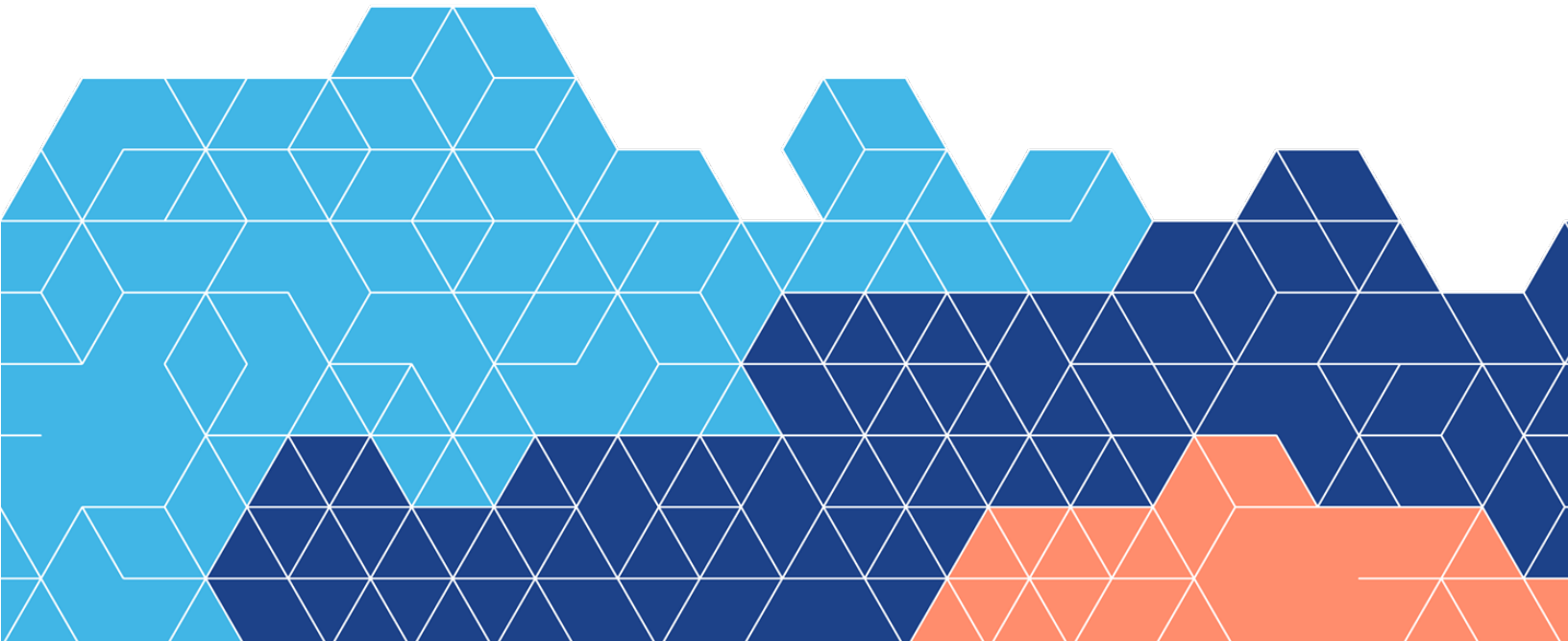
Enterprise Project Management Office (ePMO) Vendor

Letter of Offer

CONFIDENTIAL

San Juan, PR

March 18th, 2022




Attachment B: Title Page, Vendor Information, Executive Summary, Subcontractor Letters, and Table of Contents

1. 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 PRMP, 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 RFO.

 / 03/18/22
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 RFO are current, complete, and accurate.
2. The vendor's response meets the requirement of this RFO.
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. PRMP 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 RFO, 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 award, the vendor affirms it will have all current approvals, licenses, or other qualifications needed to conduct business in Puerto Rico.

2. Vendor Information

2.1 Payment Information

| Payment Information | | | |
|----------------------------|--|--------|--------------|
| Name: | Michelle Purcell | Title: | Comptroller |
| Address: | 644 Ave. Fernández Juncos, Suite 401 | | |
| City, State, and Zip Code: | San Juan, PR 00907 | | |
| Phone: | 787-919-7303 | Fax: | 787-919-7319 |
| Email: | michellepurcell@v2aconsulting.com | | |

2.2 Legal Notice Information

| Legal Notice Information | | | |
|----------------------------|--|--------|--------------|
| Name: | Graciela Salcedo | Title: | Director |
| Address: | 644 Ave. Fernández Juncos, Suite 401 | | |
| City, State, and Zip Code: | San Juan, PR 00907 | | |
| Phone: | 787-919-7303 | Fax: | 787-919-7319 |
| Email: | gracielasalcedo@v2aconsulting.com | | |

3. Executive Summary

We are pleased to submit our proposal to serve as Enterprise Project Management Office (ePMO) Vendor for the Medicaid Enterprise System (MES) program in response to the RFO (2021-PRMP-MES-ePMO-003) issued on February 3, 2022. We appreciate the opportunity to offer our services in support of what we consider to be a critical moment in the digital transformation journey of the Puerto Rico Medicaid Program (PRMP).

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 takes into account the strategic value of each element of the engagement, seeking to provide strategic insight in 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 particular 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, working hand-in-hand with our client’s leaders and sharing their challenges and successes.

We are pleased to partner with Health Management Associates (HMA) to propose an ePMO which brings together the best talent, expertise, and experience from both organizations. Combining V2A’s strategic planning, organization change management, business process optimization and project management expertise with HMA’s subject matter knowledge and industry/market-specific strategic and tactical advice offers a unique value proposition for PRMP. V2A and HMA have successfully collaborated in the past in a strategic planning engagement with a local managed care organization. We bring an unparalleled combination of V2A’s local, bilingual, and bicultural talent and HMA’s resources who are bilingual, experienced in MES requirements and the information systems the PRMP is implementing as part of the MES program, and highly knowledgeable of Puerto Rico’s Medicaid program and health care system. Thus our team brings the right knowledge of local program goals, needs and dynamics, combined with macro expertise, including federal goals and compliance requirements.

Having recently worked with PRMP in the Organization Change Management related to the MEDITI3G implementation, V2A knows the key stakeholders involved in these technological projects and has a deep understanding of the culture and needs of the organization. We have the ability to support not just the technology implementation but PRMP’s ability to fully leverage the technology’s potential, and the right approach, discipline, and temperament to engage all of the project’s stakeholders and maximize our team’s effectiveness.

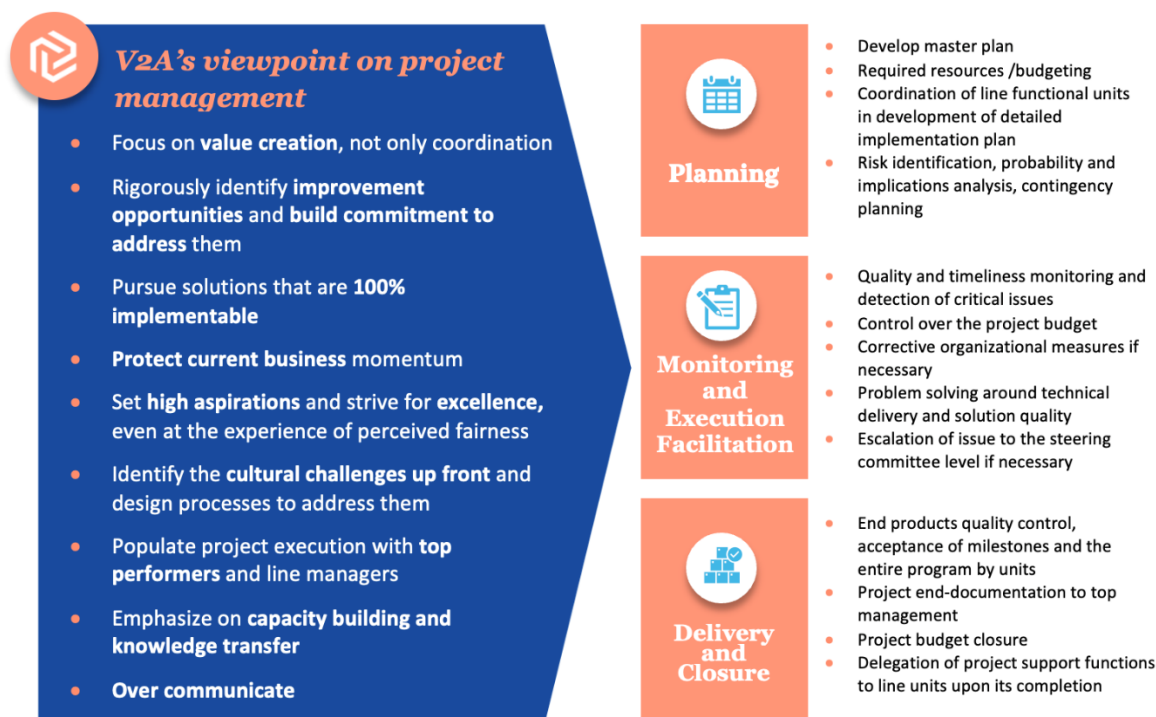
Over the last twenty years HMA has worked with health and human services agencies in Florida, Georgia, Indiana, Iowa, Kentucky, Oklahoma, and South Dakota on Medicaid enterprise system projects. Currently,

HMA is supporting South Dakota's Department of Social Services on its implementation of the same platform deployed in Puerto Rico as MEDIT3G with the same vendor (Redmane). In our Indiana, Kentucky and Oklahoma projects, HMA worked with the same MES platform (interChange) being deployed in Puerto Rico and the same vendor (Gainwell) that deployed it on the island. Additionally, the HMA team includes the former lead of Gainwell's MES implementation and operation in the U.S. Virgin Islands.

In addition, V2A's experience with local insurance companies which are key stakeholder for MMIS, enable us to serve as a bridge between PRMP and MCOs. HMA has also worked with health plans – Triple-S, MMM and Molina Healthcare of Puerto Rico – and providers – Puerto Rico Renal Health, Caribbean Medical Center – in Puerto Rico on a wide variety of projects.

Our PMO methodology is divided in three phases: 1) planning, 2) monitoring and execution facilitation, and 3) delivery and closure. **Figure 1** below explains in more detail our methodology and the elements in each phase. In the planning stage we typically address project charters, scheduling, risk elements and resource planning, among others identified in the scope of work services. In the monitoring and execution facilitation stage we work diligently to make sure progress is achieved. In this phase we review on a continuous basis the results of individual and team efforts, we also provide constant visibility with comprehensive reporting and manage escalations and modifications to ensure alignment and goal attainment. On the final stage, we work to ensure appropriate closure of projects so that lessons learned can be capture and knowledge appropriately shared for future reference.

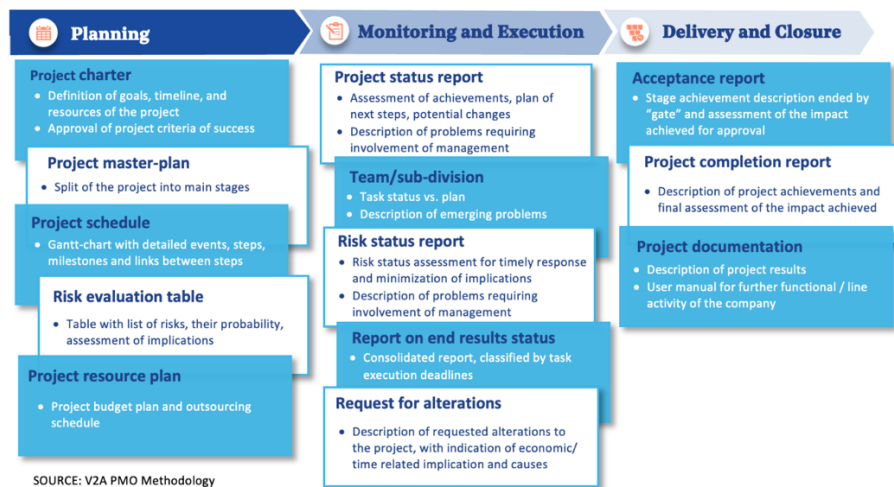
Figure 1: V2A's PMO Methodology



SOURCE: V2A PMO Methodology

A robust set of tools and deliverables will be used in each of the phases of this work as shown in **Figure2**.

Figure 2: V2A's PMO Methodology- Key Tools



We have designed a robust team composition comprised of a central ePMO team and the ability to quickly deploy PM teams in support of each key project. These teams will be comprised of certified and experienced project managers from V2A and subject matter experts from HMA supporting with integration, testing, quality, and certification efforts. The scope of work included in this proposal covers an initial two years with the possibility of extending support for three additional years.

Our proposed approach to establishing and operating the ePMO is designed to ensure project continuity while bringing a fresh perspective to the management of a complex implementation. V2A's proven experience with LEAN management gives us the ability to effectively coalesce key stakeholders and provide a robust and efficient governance framework. More than Project Management, our approach is based on **Project Leadership** as defined in **Figure 3**.

Figure 3: Project Management vs. Project Leadership

|  Project Management |  Project Leadership |
|--|--|
| Focus on Scope + Time + Cost | Focus on Delivering Value |
| Aim to please all stakeholders | Delight the most important customer(s) |
| Many big important meetings | Many 1-on-1s and small group conversations |
| Report to the Steering Group | Engage daily with key sponsor |
| Build detailed plans and WBS | Unleash creativity and innovation from project team |
| Maintain risk management matrix | Eliminate biggest issues OR incorporate them as facts |
| Provide status reports and color-coded dials | Tell the truth of the project: no sugar-coat but no drama |
| Enforces PMI and Agile processes | Firm on principles , Flexible on methods |
| Task Driver and Resource Planner | Praise- Champion and Team- Protector |
| Control the requirements: fail slowly, fail big | Accept uncertainty : fail fast, fail small, fail often |

SOURCE: BY ERIC RAZA FROM PEXIUS

4. Subcontractor Letters

HEALTH MANAGEMENT ASSOCIATES

March 11, 2022

Graciela Salcedo
V2A Consulting
644 Fernández Juncos Ave.
District View Plaza, Suite 401
San Juan, PR 00907-3122

**SUBJECT: Puerto Rico Medicaid Enterprise System
Enterprise Project Management Office Vendor Request For Offer
(2021-PRMP-MES-ePMO-003)**

Dear Ms. Salcedo:

Health Management Associates, Inc. (HMA) is pleased to submit this letter of commitment to V2A Consulting in response to the above-referenced RFP for the Puerto Rico Medicaid Enterprise System.

If V2A is selected for this work, HMA is committed to being responsible for four distinct work streams within the ePMO:

- Integration management
- Quality management
- Testing management
- Certification management

HMA resources will serve as the leads for these work streams, working through an HMA team manager to coordinate their activities with other ePMO activities. Additionally, HMA will provide subject matter experts who will work closely with the lead of the quality management, testing management, and certification management work streams.

HMA is a private, for-profit "C" corporation, incorporated in the State of Michigan in good standing and legally doing business as Health Management Associates, Inc. Our Federal Employer Identification Number is 38-2599727 and our DUNS number is 174924845. Our principal address is 120 N. Washington Square, Suite 705, Lansing, MI 48933.

HMA has read and understands the RFO and will comply with the requirements of the RFO.

HMA will maintain any permits, licenses, and certifications requirements to perform its portion of the work.

As general counsel, I am authorized to make these certifications and assertions for HMA. I can be contacted at proposals@healthmanagement.com, by phone at 517-482-9236, or by fax at 517-482-0920. My mailing address is 120 N. Washington Square, Suite 705, Lansing, MI 48933.

HMA looks forward to supporting V2A and the Puerto Rico Medicaid Enterprise System in this important work.

Sincerely,

Lisa Higgins
General Counsel

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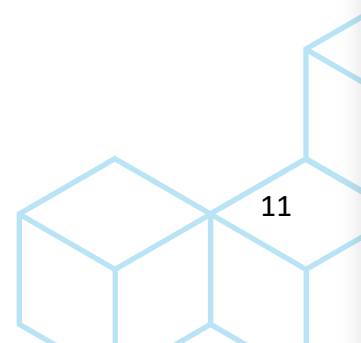
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6. Disclosure of Response Contents

All vendors, selected for negotiation by PRMP, will be given equivalent information concerning cost negotiations. All cost negotiations will be documented for the procurement file. Additionally, PRMP may conduct target pricing and other goods or services level negotiations. Target pricing may be based on considerations such as current pricing, market considerations, benchmarks, budget availability, or other methods that do not reveal individual vendor pricing. During target price negotiations, vendors are not obligated to reduce their pricing to target prices, but no vendor is allowed to increase prices.

All materials submitted to PRMP in response to this RFO shall become the property of the Government of Puerto Rico. Selection or rejection of a response does not affect this right. By submitting a response, a 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. If a vendor determines there is a "Trade Secret" contained in the proposal, the vendor must send a written notification to the Solicitation Coordinator when submitting the proposal to prevent public disclosure of the "Trade Secret." A redacted version of the technical proposal must be provided to PRMP at the time of proposal submission if there are "trade secrets" the proposing Vendor wishes to not be made public.

A redacted proposal should be provided separately from the technical and cost envelopes and should be in addition to (not in place of) the actual technical or cost proposal. PRMP will keep all response information confidential, including both technical and cost information, during the evaluation process, except for the questions and answers before the submittal of proposals.

Upon completion of response evaluations, indicated by public release of a Notice of Award, the responses, and associated materials will be open for review on the website or at an alternative location as defined by PRMP. Any trade secrets notified by the vendor to the Solicitation Coordinator will be excluded from public release.

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

V2A Consulting
(Company)



Graciela Salcedo, Director

787-919-7303/ 787-919-7313
(Contact Phone/Fax Number)

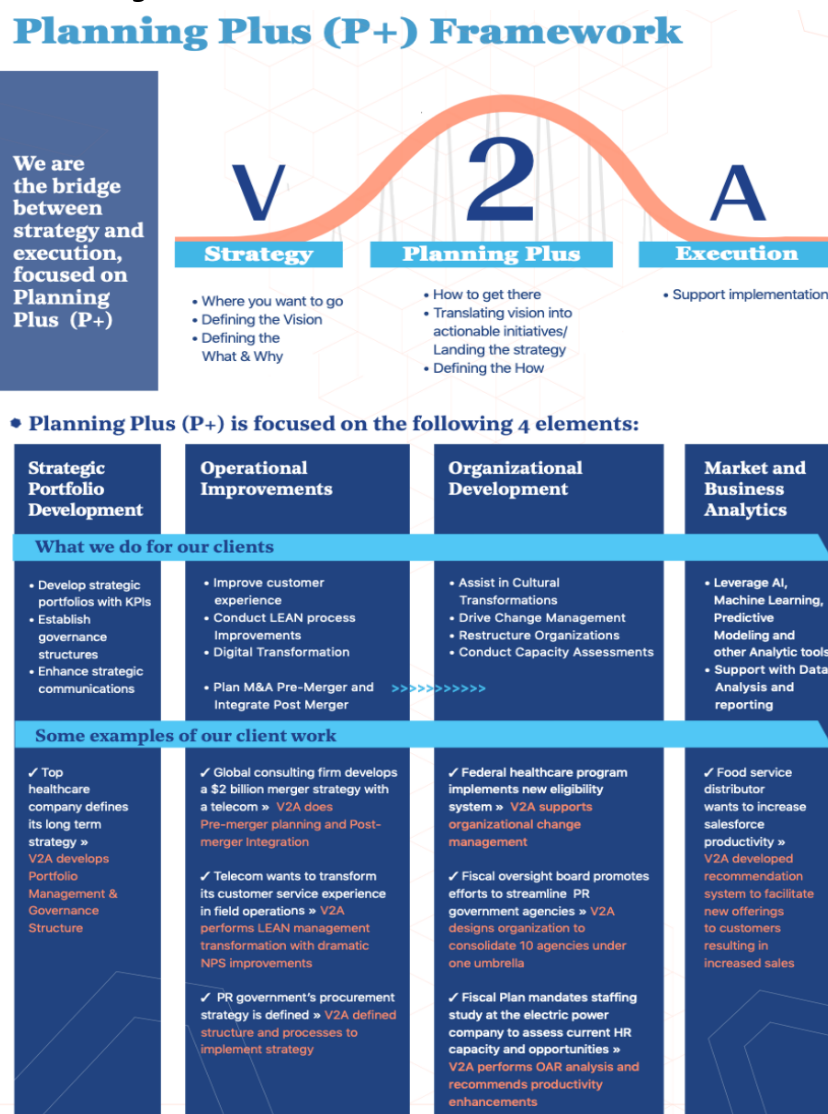
March 18, 2022
(Date)

Attachment C: Vendor Qualifications and Experience

1. Organization Overview

V2A Consulting ("V2A") is a minority and women-owned Puerto Rico-based professional services firm with over 15 years of experience in helping businesses define and achieve their objectives. We are trusted advisors to CEOs and top executives in service organizations across Puerto Rico and the Caribbean basin. We focus on Planning Plus (P+) services facilitating as a bridge between strategy and execution. (See **Figure 4**) Over 60% of strategic plans fail when it comes to their execution. We help our clients land their strategy and translate their vision into action. P+ is focused on Strategic Portfolio Management, transformations around Operational Improvements and Organizational Development, supported with robust Market and Business Analytics.

Figure 4: V2A's Planning Plus Framework



We differentiate ourselves by our philosophy:

- We believe that management teams should “**own**” their strategic management processes. We don’t tell clients what to do, but rather **work together** in finding 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 **success** is defined by our clients’ **results**. More than just defining visions and plans, we emphasize the development of specific, **high impact action** and help our clients every step of the way in achieving **results... from Vision to Action!**

V2A is pleased to partner with Health Management Associates (HMA) to propose an ePMO which brings together the best talent, expertise, and experience from both organizations. HMA has established an Information Technology Advisory Services practice that has worked with state and territorial Health and Human Services (HHS) agencies on major information system planning, procurement, and implementation projects. In addition to leading a health insurance exchange feasibility assessment project with Puerto Rico’s Department of Health in 2011-2012, HMA has worked with health and human services agencies in Florida, Georgia, Indiana, Iowa, Kentucky, Oklahoma, and South Dakota on Medicaid enterprise system implementation and optimization projects. On all these projects, HMA served as a trusted advisor to agency leaders as they sought to invest in modern Medicaid program management information systems. Currently we are supporting South Dakota’s Department of Social Services on its implementation of the same platform deployed in Puerto Rico as MEDITI3G with the same vendor (Redmane) that deployed it in Puerto Rico. In our Indiana, Kentucky, and Oklahoma projects, we worked with the same MES platform (interChange) being deployed in Puerto Rico and the same vendor (Gainwell) that developed the platform.

More broadly, for more than 35 years HMA has helped HHS government agencies throughout the nation harness the power of information technology to meet their programmatic goals. Our team has experts in information technology policy, regulation, and initiatives at the federal, state, and local levels and is engaged in a wide range of efforts to foster the design, development, and implementation of information technology solutions for diverse clients. Moreover, HMA is dedicated to improvements in health care program management and service delivery; our team of more than 600 professionals (including our subsidiaries) has real-world experience in government agencies, health plans, and health care providers. The team assembled by HMA includes consultants with demonstrated experience supporting health information technology strategy development and procurement projects with a strong knowledge of electronic health records in public health settings.

1.1 Vendor Overview

Table 1: Vendor Overview

| Vendor Overview | |
|--|--|
| Company Name | V2A, LLC |
| Name of Parent Company (If Applicable) | NA |
| Industry (North American Industry Classification System [NAICS]) | 541611 - Administrative Management and General Management Consulting Services |
| Type of Legal Entity | Limited Liability Company |
| Company Ownership | Private (4 partners- Manuel Calderón, Roberto Jiménez, Juan Pablo González and Graciela Salcedo) |
| Number of Full-Time Employees | 42 |
| Last Fiscal Year Company Revenue | \$9,029,036 |
| Last Fiscal Year Company Net Income | \$996,736 |
| Percentage of Revenue from State and Local Government Clients in the United States and its territories | 45% |
| Percentage of Revenue from IT Design and Implementation Services | 15% |
| Number of Years in Business | 18 |
| Number of Years Vendor has been Providing the Type of Services Specified in the RFO | 18 |
| Headquarters in the United States | San Juan, Puerto Rico |
| Locations in the United States | San Juan, Puerto Rico |

1.2 Subcontractor Overview

Table 2: Subcontractor Overview

| Subcontractor Overview | |
|--|---|
| Company Name | Health Management Associates |
| Name of Parent Company (If Applicable) | N/A |
| Industry (North American Industry Classification System [NAICS]) | 541611 - Administrative Management and General Management Consulting Services |
| Type of Legal Entity | United States C corporation |

| | | |
|--|--|--|
| Company Ownership | | Private |
| Number of Full-Time Employees | | Health Management Associates, Inc. has 398 employees (not including subsidiaries). |
| Last Fiscal Year Company Revenue | | \$104 million (not including subsidiaries) |
| Last Fiscal Year Company Net Income | | \$6 million (not including subsidiaries) |
| Percentage of Revenue from State and Local Government Clients in the United States and its territories | | 25% |
| Percentage of Revenue from IT Design and Implementation Services | | 3% |
| Number of Years in Business | | 36 years |
| Number of Years Vendor has been Providing the Type of Services Specified in the RFO | | 22 |
| Headquarters in the United States | | 120 N Washington Square Suite 705 Lansing, MI 48933 |
| Locations in the United States | We maintain offices in: <ul style="list-style-type: none"> • Albany, NY • Atlanta, GA • Austin, TX • Boston, MA • Chicago, IL • Columbus, OH • Costa Mesa, CA • Denver, CO • Durham, NC • Harrisburg, PA • Indianapolis, IN | <ul style="list-style-type: none"> • Lansing, MI • Los Angeles, CA • New York, NY • Philadelphia, PA • Phoenix, AZ • Portland, OR • Sacramento, CA • San Francisco, CA • Seattle, WA • Tallahassee, FL • Washington, DC |

Founded in 1985, HMA (www.healthmanagement.com) is a national health and human services consulting firm that is widely regarded as a leader in providing technical and analytical services to federal and state government agencies, health care purchasers, payers, providers, associations, and foundations. HMA builds teams for each project and its specific needs because we respect the complexity of health care and the individualized project portfolios of each of our clients. This adaptability and our model of having seasoned experts personally provide consulting services rather than delegating the work to less experienced staff allows us to be accountable to our clients in a unique way.

We have worked with clients in every state across the nation to drive innovation, elevate standards of care, and transform health and human services for underserved populations. We have an intimate understanding of the challenges and constraints our clients face, and we work across disciplines and geographical regions to put that knowledge to work for every client. We are confident we have the experience to not only meet the needs of this project, but to exceed them.

The right information technology solutions position health and human services agencies for success within the increasingly complex and information-driven health and human services ecosystem. HMA has been engaged by multiple health and human services agencies across the country to provide advice and

guidance through the process of assessing, selecting, and implementing information systems to meet the ever-evolving needs. We have experience collecting and translating key strategic and tactical drivers into functional, technical, and management requirements for IT solutions and – perhaps more importantly – ensuring the potential for IT solutions is fully realized by ensuring integration of effort across IT projects, engaging stakeholders, and promoting their participation in projects, and applying our collective experience from multiple projects.

HMA is a private, for-profit “C” corporation, incorporated in the State of Michigan in good standing and legally doing business as Health Management Associates, Inc.






2. Mandatory Qualifications

Table 3: Mandatory Qualifications

| Mandatory Qualification Item (s) | Vendor Meets? | | Provide a Brief Narrative to Demonstrate Fulfillment of Requirement |
|--|---------------|----|---|
| The vendor must have at least six (6) years of experience in establishing and maintaining a project management office of similar size, scope, and complexity as described in this RFO. | YES | NO | V2A has extensive experience over the past 15 years, establishing and maintaining PMO in various industries, as stated in Vendor References below. A sample is included in Figure 5 below. HMA has over 20 years of experience helping U.S. states and territories on major information technology-intensive projects. |
| The vendor must demonstrate at least three (3) years’ experience in Medicaid and Health and Human Services. | YES | NO | V2A spent the past 2 years supporting PRMP with Organization Change Management efforts related to MEDIT3G. HMA has over 30 years of experience in Medicaid and Health and Human Services and over 20 years of experience helping U.S. states and territories on major information technology-intensive projects. |
| The vendor must include at least three (3) references from projects performed within the last three (3) years that demonstrate the vendor’s ability to perform the scope of work described in the RFO. Vendors may only use one (1) reference per project performed. | YES | NO | References included. |

Figure 5 below includes a sample of the many projects V2A has led related to portfolio and project management in various industries and of similar size, scope and complexity as the one required for MES.

Figure 5: Sample V2A Experience in PMO

| Project Management & PMO Implementation | Client | Project | Description |
|---|---|---|---|
| |  Managed Care Organization | Strategic Portfolio Management 2017-2020 | <ul style="list-style-type: none"> Designed and implemented a strategic portfolio management office PMO Managed a portfolio of over 100 projects spanning all departments in the organization Facilitated monthly governance meetings and provided visibility of portfolio status |
| |  Global Pharma Company | Integration of Puerto Rico Operations Management 2004-2006 | <ul style="list-style-type: none"> Integrated the local operations of two large multinational pharmaceutical companies (6 manufacturing sites). Developed a time-based, focused integration process that mobilized the organization along functional areas to seek alignment and synergies. Over sixty specific actions/initiatives were identified and pursued. Identified and captured potential synergies exceeding \$2MM in the first wave of initiatives. |
| |  PR-Based Public Financial | Integration of Banking and Mortgage Companies 2006-2010 | <ul style="list-style-type: none"> Integrated independent mortgage origination functions to an existing bank structure. Redesigned and integrated organizational structures, including a consolidated branch network with all product and service offerings. Identified and captured potential synergies exceeding \$5MM (15% of cost base) in cost savings through headcount reductions, branch network consolidation, and back-office functions integration. |
| |  Global Pharma Company | Large Scale Post-Merger Integration Management 2009-2010 | <ul style="list-style-type: none"> Developed and managed a project management office to manage 16 work fronts, covering 84 initiatives for manufacturing and supply operations integration. The PMO led this effort across 6 locations in 3 countries. |
| |  Global Telecom Company | Acquisition & Post-Merger Integration Management 2021-2022 | <ul style="list-style-type: none"> Performed the pre-close merger planning and managed the post-close integration of two large telecommunication companies (with over 1k in combined employees) in 9 months. Developed a time-based, focused integration process that mobilized the organization along 20 functional areas to seek alignment and synergies through seven corporate-wide projects. Achieved \$3MM in synergies during this period, \$1MM ahead of M&A plan. |

Note: Sample of V2A projects does not include full summary of V2A experience; client details are not disclosed to maintain confidentiality

3. Existing Business Relationships with Puerto Rico

Over the past 5 years, V2A has maintained business relationships with several government agencies in Puerto Rico, including the PRMP supporting Organization Change Management tied to MEDITI3G. **Table 4** below summarizes these engagements.

Table 4: V2A Business Relationships with Puerto Rico

| Client | Engagement | Description | References |
|---|---|---|---|
| PRDOH - Medicaid Program (PRMP) | Organization Change Management (April 2020- Sept. 2021) | <ul style="list-style-type: none"> Ensured PRMP employees embraced the changes brought about by the new MEDITI3G system, after conducting a diagnostic to understand key stakeholder's mindsets and behaviors towards proposed changes Designed a structured change management program along with the coordination of all training and communication efforts related to the new system Conducted a capacity analysis, understanding responsibilities of key positions and how they are impacted by the new system | Luz (Nildy) Cruz Romero (Operations Director) |
| Administración de Servicios Generales (ASG) | Implementation of Procurement Transformation (Sept 2020- Present) | <ul style="list-style-type: none"> Support implementation of a new centralized procurement model for the PR Government behind an operational transformation that ensures standardization of processes, transparency, and savings Included capacity analysis of all areas, automation of procurement process under a web application and centralization of purchasing categories to achieve savings | Joel Fontanez (Sub-Administrator) |
| Department of Economic Development & Commerce (DDEC) | Organizational Restructure (Aug 2017- Present) | <ul style="list-style-type: none"> Consolidated 10 agencies with economic development functions into a single Department of Economic Development with a simple yet effective structure specifically created to improve the "clients' journey" Maximized efficiency of the new department consolidating shared services, relocating personnel for optimum physical spaces usage and consolidating contracts portfolio leveraging on economies of scale Improved effectiveness of the department creating a "One-Stop Shop" for all clients' needs, consolidating similar programs, strengthening key services, eliminating, or creating new operations and streamlining processes | Manuel Cidre/ Manuel Laboy (Current and Former Secretaries) |
| PR Electric Power Authority (PREPA) | Human Resource Capacity Assessment (Dec 2018- Dec 2019) | <ul style="list-style-type: none"> Conducted a comprehensive Labor Capacity Assessment for PREPA to determine optimal staffing as mandated by the fiscal plan under its operational initiative of rightsizing (Over 380 interviews- 5,300 employees) Identified critical gaps in core areas and positions as well as opportunities within the organization for personnel redistribution | Fernando Padilla (Chief Operating Officer) |
| PR Police Department (PRPD) | Staffing Allocation & Resource Study (May 2017- May 2018) | <ul style="list-style-type: none"> Performed a federally mandated staffing allocation study for a 13,000-employee law enforcement agency Discovered inefficiencies and pain points throughout operations and administration processes Identified more than 30 actionable recommendations including department reorganization, process modernization, overtime spend reduction, personnel redistribution, position reclassification and others | Col Clementina Vega Rosario (Executive Director- Police Reform) |

HMA had the pleasure of working with the Puerto Rico Department of Health in 2011-2012 on an initiative focused on evaluating the feasibility of Puerto Rico establishing a health benefit exchange (HBE) in accordance with provisions of the Affordable Care Act (ACA). Per the ACA, U.S. territories were provided the option of establishing an HBE or redirecting funds earmarked for HBE premium subsidies to their Medicaid programs. An HMA-led team comprised of former HBE leaders, Medicaid program experts, actuaries from Milliman and a Puerto Rico-based economic consulting firm built a model of how an HBE could be established in Puerto Rico, modeled the advantages and drawbacks of establishing an HBE vs. further investing in the Medicaid program, and conducted a study of uninsured and underinsured individuals in the territory. This project also had a significant information technology component as such the HMA team engaged the Department of Health's IT leadership to identify and evaluate key information system requirements for mounting an HBE and the requisite interfaces for information verification and communication with systems such as MEDITI.

4. Business Disputes

V2A has not been a subject of any disciplinary action, does not have any pending litigation and has never been terminated for cause or convenience.

HMA has not been a subject of any disciplinary action, does not have any pending litigation and has never been terminated for cause or convenience on any project with a Puerto Rico-based client.

5. References

5.1 Vendor References

Table 5: Vendor Reference #1

| Vendor Information | | |
|--|----------------|--|
| Vendor Name: V2A Consulting | Contact Name: | Graciela Salcedo |
| | Contact Phone: | 787-919-7303 |
| Customer Information | | |
| Customer Organization: Puerto Rico Medicaid Program | Contact Name: | Luz (Nildy) Cruz |
| | Contact Title: | Director of Operations |
| Customer Address: 268 World Plaza, Suite 505 Ave. Muñoz Rivera Hato Rey, PR 00917 | Contact Phone: | 787-765-2929 ext. 6732 |
| | Contact Email: | luz.cruz@salud.pr.gov |

| Project Information: | |
|---|---|
| Total Vendor Staff: | 7 people: 1 Engagement Director, 1 Engagement Manager, 2 Consultants, 3 Subject Matter Experts. |
| Project Objectives: To create understanding, involvement, and ownership within the regional and local office staff members to embrace the opportunities created by the new E&E [MEDITI3G] system. | |

| | | | | |
|--|-------|--|-----|--------------------|
| Vendor's Objectives: <ul style="list-style-type: none"> • Understand the current state of key stakeholders' mindsets and behaviors towards current and proposed changes in processes and systems • Design a structured change management program aimed at coaching and supporting key stakeholders in embracing the changes and mitigating any resistance • Facilitate the implementation of the approved project OCM plan, particularly previously defined communications, and training plans, as well as additional training and coaching to local and regional office staff to ensure the desired mindsets and behaviors are adopted | | | | |
| Project Benefits: <ul style="list-style-type: none"> • Implementing a change management program to support the implementation of the new eligibility systems, allows the Medicaid program to understand and manage the level of readiness of the Program for the transition identifying operational roadblocks and areas of resistance within its culture, as well as the potential levers in the Program's "way of doing things" that could accelerate and deepen its adoption. • Monitoring, measuring, and analyzing the level of readiness (before implementation), and the level of adoption (during implementation) allows the program to implement corrective measures when and where needed to ensure a progressive transition, minimizing setbacks, and operational disruptions. | | | | |
| Project Team | | | | |
| Graciela Salcedo | | Engagement Director | | |
| Paul Cohen | | Engagement Manager | | |
| Marlene De Varona | | LEAN Methodology and Training SME | | |
| Carmen Denton | | Training SME | | |
| Margarita Gregorio | | Communications SME | | |
| Project Measurements: | | | | |
| Estimated Project One-time Costs: N/A | | Actual Project One-time Costs: N/A | | |
| Reason(s) for change in value: N/A | | | | |
| | | | | |
| Original Value of Vendor's Contract: \$646,500 | | Actual Total Contract Value: \$1,831,500 | | |
| Reason(s) for change in value: The initial Go-live date for MEDITI3G was moved from October 2020 to April 2021, then to June 2021 (mainly due to the COVID-19 lockdown's disruption). The Program requested V2A to extend the support during the implementation until September 2021. | | | | |
| | | | | |
| Estimated Start & Completion Dates: | From: | March 16, 2020 | To: | September 30, 2020 |
| Actual Start & Completion Dates: | From: | March 16, 2020 | To: | September 30, 2021 |
| Reason(s) for the difference between Estimated and Actual dates: The initial Go-live date for MEDITI3G was moved from October 2020 to April 2021, then to June 2021 (mainly due to the COVID-19 lockdown's disruption). The Program requested V2A to extend the support during the implementation until September 2021. | | | | |
| Vendor Information | | | | |
| | | | | |
| If the vendor performed the work as a subcontractor, the vendor should describe the scope of subcontracted activities: N/A | | | | |

Table 6: Vendor Reference #2

| Vendor Information | | |
|---|----------------|------------------------------|
| Vendor Name: V2A Consulting | Contact Name: | Manuel Calderón |
| | Contact Phone: | 787-919-7303 |
| Customer Information | | |
| Customer Organization: Liberty Communications of Puerto Rico | Contact Name: | Esteban Luengo |
| | Contact Title: | VP Transformation & PMO |
| Customer Address: 279 Ave. Ponce de León San Juan, PR 00917 | Contact Phone: | 787.657.3050 x4201 |
| | Contact Email: | Esteban.luengo@libertypr.com |

| Project Information: | |
|--|--|
| Total Vendor Staff: | 8 people: 1 Engagement Director, 1 Engagement Manager, 1 Senior Associate, 4 Associates, 1 Analyst |
| Project Objectives: <ul style="list-style-type: none"> • Manage the day-to-day post-merger integration program, oversee functional teams integration work plans and the execution of strategic projects • Ensure the successful operational and cultural integration of functional teams, ensuring a timely exit of TSA (Transition Services Agreements) • Ensure continuity of business operations to achieve the integration synergy targets | |
| Vendor's Objectives: As an extension of the Carve-out Integration Management Office (CIMO) in charge of managing the Liberty and AT&T post-merger integration program: <ul style="list-style-type: none"> • Manage strategic projects in areas of Retail, Procurement, Finance, Supply Chain, HR • Design and implement the Program reporting tool for stakeholders • Support functional teams as they implement their end-state plans and move to business-as-usual • Support the definition of the new operational model • Organizational redesign of key departments | |
| Project Benefits: Seamless transition from two companies into one, integrating cultures, maintaining service level and customer satisfaction while achieving value capture targets. | |
| Key Personnel | |
| Manuel Calderón | Engagement Director |
| Joaquín Rodríguez | Engagement Manager |
| David Candelario | Senior Associate |
| Diego Trigueros | Associate |
| Mariya Pietrosyan | Associate |
| Rafael Arias | Associate |
| Aníbal Sánchez | Associate |
| Federico Forsythe | Analyst |
| Project Measurements: | |
| Estimated Project One-time Costs: N/A | Actual Project One-time Costs: N/A |
| Reason(s) for change in value: N/A | |
| | |
| Original Value of Vendor's Contract: \$2,470,000 | Actual Total Contract Value: \$1,775,000 billed to date |

| | | | | |
|--|-------|--------|-----|---------|
| Reason(s) for change in value: This is an ongoing project where client has requested additional support in specific areas. Total projected contract value in \$2,675,000 based on requests received as of this date. | | | | |
| | | | | |
| Estimated Start & Completion Dates: | From: | 1/2021 | To: | 12/2022 |
| Actual Start & Completion Dates: | From: | 1/2021 | To: | Present |
| Reason(s) for the difference between Estimated and Actual dates: Client request for additional support | | | | |
| Vendor Information | | | | |
| | | | | |
| If the vendor performed the work as a subcontractor, the vendor should describe the scope of subcontracted activities: N/A | | | | |

Table 7: Vendor Reference #3

| | | |
|---|----------------|----------------------------|
| Vendor Information | | |
| Vendor Name: V2A Consulting | Contact Name: | Graciela Salcedo |
| | Contact Phone: | 787-919-7303 |
| Customer Information | | |
| Customer Organization: Triple-S Salud | Contact Name: | Madeline Hernández-Urquiza |
| | Contact Title: | Former President |
| Customer Address: P.O. Box 363628 San Juan, PR 00936-3628 | Contact Phone: | 939-640-3444 |
| | Contact Email: | Murquiza04@gmail.com |

| | |
|--|---|
| Project Information: | |
| Total Vendor Staff: | 3 people: 1 Engagement Director, 1 Engagement Manager and 1 Associate, plus additional teams for implementation of key projects |
| Project Objectives: Establish a comprehensive PMO framework aligned with the internal PMO structure to ensure the successful completion of the Triple-S Salud Strategic Plan implementation agenda. Focus on overall portfolio and program support, while providing implementation support to key initiatives, including transformation of critical processes using LEAN principles. | |
| Vendor's Objectives: Provide central oversight and monitoring over strategic initiatives. Prioritize project portfolio, create dashboard with project status visibility and facilitate monthly sessions to provide project updates. | |
| Project Benefits: Clear visibility of strategic portfolio of projects, leading to successful implementation of initiatives. | |
| Key Personnel | |
| Graciela Salcedo | Engagement Director |
| Geraldine Rodriguez | Engagement Manager |
| Deliris Ortiz | Associate |
| Project Measurements: | |
| Estimated Project One-time Costs: N/A | Actual Project One-time Costs: N/A |

| | | | |
|--|-------|--|-------------|
| Reason(s) for change in value: | | | |
| | | | |
| Original Value of Vendor's Contract: \$9,005,620 | | Actual Total Contract Value: \$9,005,620 | |
| Reason(s) for change in value: N/A | | | |
| | | | |
| Estimated Start & Completion Dates: | From: | 01/2017 | To: 12/2020 |
| Actual Start & Completion Dates: | From: | 01/2017 | To: 12/2020 |
| Reason(s) for the difference between Estimated and Actual dates: N/A | | | |
| Vendor Information | | | |
| | | | |
| | | | |
| If the vendor performed the work as a subcontractor, the vendor should describe the scope of subcontracted activities: N/A | | | |

Table 8: Vendor Reference #4

| | |
|---|--|
| Vendor Information | |
| Vendor Name: V2A Consulting | Contact Name: Graciela Salcedo |
| | Contact Phone: 787-919-7303 |
| Customer Information | |
| Customer Organization: ASTHO Association of State and Territorial Health Officials | Contact Name: Neyling Fajardo |
| | Contact Title: Director Territorial Support |
| Customer Address: 600 Peachtree Street NE, Suite 1000, Atlanta, GA 30308 | Contact Phone: 571-527-3156 |
| | Contact Email: nfajardo@astho.org |
| Key Personnel | |
| Project Information: | |
| Total Vendor Staff: | 4 people: 1 Engagement Director, 1 Engagement Manager, 1 Business Analyst, and 1 Analytics SME |
| Project Objectives: Develop a toolkit to guide Health Departments in implementing and sustaining a more centralized Grants Management Office to maximize federal funding outcomes. | |
| Vendor's Objectives: Toolkit framework took into consideration Organization, Accounting and Reporting attributes related to the grant management process. The approach consisted of two phases: <ul style="list-style-type: none"> Diagnose – Data Collection & Analysis. Understand strengths and opportunities for improvement in existing PRDOH grant management structure and other state and territory Health Departments Design – Toolkit Development. Formulate a design framework and develop tools to determine human resources gap analyses, suggest best roles and responsibilities configuration, define cost allocation, and provide reporting mechanisms. | |
| Project Benefits: Centralize key functions at Grant Management Office to improve transparency, accountability, and reporting, as well as streamline management of grants and financial reports at PRDOH to maximize the utilization of federal grant funds. | |

| Key Personnel | | | | |
|---|--|--|------------------|-------------------|
| Graciela Salcedo | | Engagement Director | | |
| Geraldine Rodríguez | | Engagement Manager | | |
| Jesús Hernández | | Business Analyst | | |
| Xavier Divi | | SME Analytics | | |
| Project Measurements: | | | | |
| Estimated Project One-time Costs: n/a | | Actual Project One-time Costs: n/a | | |
| Reason(s) for change in value: n/a | | | | |
| | | | | |
| Original Value of Vendor's Contract: \$120,000 | | Actual Total Contract Value: \$120,000 | | |
| Reason(s) for change in value: n/a | | | | |
| | | | | |
| Estimated Start & Completion Dates: | | From: | January 14, 2021 | To: June 22, 2021 |
| Actual Start & Completion Dates: | | From: | February 4, 2021 | To: June 30, 2021 |
| Reason(s) for the difference between Estimated and Actual dates: Additional week was included in contract due to delays in signing NDA agreement with PRDOH. | | | | |
| Vendor Information | | | | |
| | | | | |
| | | | | |
| If the vendor performed the work as a subcontractor, the vendor should describe the scope of subcontracted activities: N/A | | | | |

5.2 Subcontractors References

Table 9: Subcontractor Reference #1

| Subcontractor Information | | |
|---|----------------|--|
| Vendor Name: Health Management Associates, Inc. | Contact Name: | Joe Moser |
| | Contact Phone: | (202) 641-0499 |
| Customer Information | | |
| Customer Organization: Oklahoma Health Care Authority (Oklahoma Medicaid) | Contact Name: | Carter Kimble |
| | Contact Title: | Executive Director, Oklahoma State Health Information Network and Exchange (Current) At the time of this project: Deputy Secretary of Health and Mental Health |
| Customer Address: 4345 N. Lincoln Blvd. Oklahoma City, OK 73105 | Contact Phone: | (512) 656-6460 |
| | Contact Email: | Lcarterk@gmail.com |

| Project Information | |
|--|---|
| Total Vendor Staff: | 10+ (not fully dedicated to the project at any point in time) |
| Project Objectives: Develop a Medicaid transformation plan that includes Medicaid expansion, delivery system and payment reform, rural health redesign and public health improvement initiatives. As an integral part of this project, assess Medicaid enterprise systems and recommend improvements to said systems to enable the proposed transformation. | |
| Project Description: Through a competitive RFP, the Oklahoma Health Care Authority (Oklahoma Medicaid) engaged HMA in November 2019 to assist the agency and Governor Kevin Stitt in major Medicaid reforms, including reviewing policy options and developing proposals for Medicaid expansion and delivery system reforms intended to improve health outcomes for Oklahomans. As an essential component of this engagement, HMA evaluated the current state of Oklahoma's Medicaid enterprise systems, including the Gainwell interChange platform which support multiple Medicaid program management functions. HMA designed and supported the execution of Oklahoma's Medicaid expansion plan and recommended changes in Medicaid enterprise systems, including but not limited to the ability to manage recipient enrollments and payments to managed care organizations (MCO) and the analytics and reporting that would be required to monitor and evaluate MCO performance and program operations. HMA also provided project management supports to this multi-million-dollar, large-scale program. Finally, as part of this engagement HMA supported development of RFPs and federal funding requests. | |
| Vendor's Involvement: See above for a comprehensive description of HMA project supports. Additionally, HMA worked closely with Gainwell in the assessment of current Medicaid enterprise system capabilities. | |
| Project Benefits: HMA has produced numerous deliverables to inform and support the implementation of the governor's Medicaid reform agenda. Moreover, HMA has assisted the state in tying these reforms to a larger message about improving population health in the state. HMA's work was featured in a state-of-the-state speech delivered by the governor and in a press conference that allowed the governor and agency leaders to demonstrate leadership on Medicaid reforms to improve health outcomes in the state. Among the greatest accomplishments during this engagement has been the work HMA and the state agency did together to draft model MCO contracts and an RFP with stakeholder engagement in four months, issue the RFP, evaluate proposals, and announce awards all in the span of seven months. The HMA team and agency officials met every deadline and stayed on the timeline originally promised to the governor and conveyed to the public. | |
| Key Personnel | |
| Joe Moser (HMA team director) | Lee Repasch |
| Juan Montañez | Barbara Butler-Moore |
| Chip Cantrell | Wade Miller |
| Kevin Moore | Lora Saunders |
| Mary Goddeeris | Matt Powers |
| Rebecca Kellenberg | Tom Dehner |
| Stephen Palmer | |
| Subcontractor Information | |
| N/A | N/A |
| Project Measurements: | |
| Estimated one-time costs: N/A | Actual one-time costs: N/A |

| | | | | |
|--|-------|--|-----|------------|
| Reason(s) for change in one-time cost: N/A | | | | |
| | | | | |
| Original Value of Vendor's Contract: \$2,379,000.00 | | Actual Total Contract Value: \$1,708,195 billed to date | | |
| Reason(s) for change in value: N/A | | | | |
| Project is on-going. N/A | | | | |
| | | | | |
| Estimated Start & Completion Dates: | From: | 11/25/2019 | To: | 05/22/2022 |
| Actual Start & Completion Dates: | From: | 11/25/2019 | To: | On going |
| Reason(s) for the difference between Estimated and Actual dates: | | | | |
| Project is on-going. | | | | |
| | | | | |
| If the vendor performed the work as a subcontractor, the vendor should describe the scope of subcontracted activities: N/A | | | | |

Table 10: Subcontractor Reference #2

| Subcontractor Information | | |
|---|---|---|
| Vendor Name: Health Management Associates, Inc. | Contact Name: | Chip Cantrell |
| | Contact Phone: | (404) 500-5083 |
| Customer Information | | |
| Customer Organization: Kentucky Cabinet for Health and Family Services (CHFS) | Contact Name: | Jennifer Harp |
| | Contact Title: | Executive Advisor to CHFS Secretary and Information Technology Lead |
| Customer Address: 275 E. Main St. Frankfort, KY 40621 | Contact Phone: | (502) 564-5497 |
| | Contact Email: | Jennifer.Harp@ky.gov |
| Project Information | | |
| Total Vendor Staff: | 10+ (not fully dedicated to the project at any point in time) | |
| Project Objectives: Transform Kentucky’s Medicaid expansion program to ensure long-term fiscal sustainability and incorporate policies to empower expansion enrollees and encourage personal responsibility and accountability for their health. As an integral part of this project, assess Medicaid enterprise systems and recommend improvements to said systems to enable the proposed transformation. | | |
| Project Description: CHFS engaged HMA to design and implement the program known as HEALTH – Kentucky’s Medicaid expansion. As part of that project, HMA performed the following activities: | | |

| | | | | |
|---|-------|---|-----|---------|
| Waiver Design and Draft: Facilitated the program design and led drafting of the 1115 demonstration waiver. HMA staff provided guidance and support including inventorying items requiring state policy decision-making, facilitating state decision-making, waiver drafting, and coordinating with the state’s actuaries in development of cost effectiveness and budget neutrality components. | | | | |
| Waiver Negotiation: Provided technical support through the CMS waiver negotiation process, including negotiation strategy development, drafting responses to CMS waiver questions, drafting initial special terms and conditions (STCs) for CMS response, and reviewing and responding to updated STCs from CMS. | | | | |
| Post-Approval Supports: Provided technical assistance on federal authority, including an analysis of technical changes required to align the 1115 waiver with other state waivers and state plan amendments. We also worked closely with the state’s systems vendors to ensure technical solutions matched the policy intentions. We drafted the administrative regulations and MCO contract amendment outlining waiver policies, developed a Policy and Procedure Manual, reviewed, and developed member, provider, and other stakeholder communications materials. We continued to serve as policy advisors, based on the state’s needs. | | | | |
| Vendor’s Involvement: See above for a comprehensive description of HMA project supports. Additionally, HMA worked closely with Gainwell, Deloitte and Salesforce in the assessment of current Medicaid enterprise system capabilities and the identification of system requirements. | | | | |
| Project Benefits: The 1115 waiver was initially approved by CMS but, after a change in administration, CMS challenged the approval originally granted to the waiver. When compounded by litigation and a change in Governor in Kentucky, the implementation of the program was ultimately cancelled. | | | | |
| Key Personnel | | | | |
| Chip Cantrell | | Lora Saunders | | |
| Lora Saunders | | Stephanie Baume | | |
| Jane Longo | | | | |
| Subcontractor Information | | | | |
| N/A | | N/A | | |
| Project Measurements: | | | | |
| Estimated one-time costs: N/A | | Actual one-time costs: N/A | | |
| Reason(s) for change in one-time cost: N/A | | | | |
| | | | | |
| Original Value of Vendor’s Contract: \$1,177,844 | | Actual Total Contract Value: \$1,177,844 | | |
| Reason(s) for change in value: N/A | | | | |
| | | | | |
| Estimated Start & Completion Dates: | From: | 04/2017 | To: | 06/2019 |
| Actual Start & Completion Dates: | From: | 04/2017 | To: | 06/2019 |
| Reason(s) for the difference between Estimated and Actual dates: N/A | | | | |
| | | | | |

If the vendor performed the work as a subcontractor, the vendor should describe the scope of subcontracted activities: N/A

Table 11: Subcontractor Reference #3

| Subcontractor Information | | |
|--|----------------|--|
| Vendor Name: Health Management Associates, Inc. | Contact Name: | Chip Cantrell |
| | Contact Phone: | (404) 500-5083 |
| Customer Information | | |
| Customer Organization: South Dakota Department of Social Services (DSS), Division of Economic Assistance | Contact Name: | Carrie Johnson |
| | Contact Title: | Director, Division of Economic Assistance, Department of Social Services (DSS) |
| Customer Address: 700 Governors Drive Pierre, SD 57501 | Contact Phone: | (605) 773-5228 |
| | Contact Email: | carrie.johnson@state.sd.us |
| Project Information | | |
| Total Vendor Staff: | 6 | |
| Project Objectives: HMA is providing project management office (PMO) services to DSS during the implementation of an eligibility and enrollment system for the Medicaid and Children’s Health Insurance Program. | | |
| Project Description: HMA’s comprehensive project management services include scheduling and performing management activities related to design, development, and implementation, independent verification and validation, and all modalities of testing including user acceptance testing. In this capacity, HMA interfaces with the entire project team: personnel from DSS and the state’s Bureau of Information and Telecommunications (BIT), RedMane – the eligibility and enrollment system vendor, and the project’s independent verification and validation (IV&V) contractor. The project’s scope also includes developing the initial project schedule and work breakdown structure that incorporates DSS-led, BIT-led, RedMane-led and IV&V-led activities in addition to certification and other critical tasks. The HMA team is responsible for continuous monitoring and updating of the project’s budget, risks, issues, decisions, and changes; participating in requirements validation, system configuration, and design sessions at the request of DSS; participating in IV&V project reviews; and supporting CMS certification activities. Finally, as an integral value-adding component of this engagement HMA is providing subject matter experts that are supporting process mapping and redesign activities and will support DSS personnel training and the overarching organizational change management that will be required to ensure a successful implementation with meaningful use of the new system. | | |
| Vendor’s Involvement: See above for a comprehensive description of HMA project supports. Additionally, HMA is working closely with RedMane to elicit, detail and prioritize system requirements, develop testing plans and protocols, and compile documents required for CMS certification. | | |

| | | | | |
|--|-------|--|-----|-----------|
| Project Benefits: DSS will replace a 40-year-old eligibility and enrollment system with a much more modern, scalable and extensible system that will support multiple program management functions across DSS divisions. As such, DSS will realize significant operational efficiencies and achieve a lower cost of information technology ownership. | | | | |
| Key Personnel | | | | |
| Chip Cantrell | | John Lasota | | |
| Alex Grodner | | Glenda Stepchinski | | |
| Rebecca Kellenberg | | Nicole McMahon | | |
| Subcontractor Information | | | | |
| Cambria Solutions | | Role: User Acceptance Testing Management | | |
| Project Measurements: | | | | |
| Estimated one-time costs: N/A | | Actual one-time costs: N/A | | |
| Reason(s) for change in one-time cost: N/A | | | | |
| | | | | |
| Original Value of Vendor’s Contract: \$2,422,940 | | Actual Total Contract Value: \$1,231,079 billed to date | | |
| Reason(s) for change in value: Project is ongoing. | | | | |
| | | | | |
| Estimated Start & Completion Dates: | From: | 7/27/2020 | To: | 1/31/2023 |
| Actual Start & Completion Dates: | From: | 7/27/2020 | To: | Ongoing |
| Reason(s) for the difference between Estimated and Actual dates: Project is ongoing. | | | | |
| | | | | |
| If the vendor performed the work as a subcontractor, the vendor should describe the scope of subcontracted activities: N/A | | | | |

Attachment D: Project Organization and Staffing

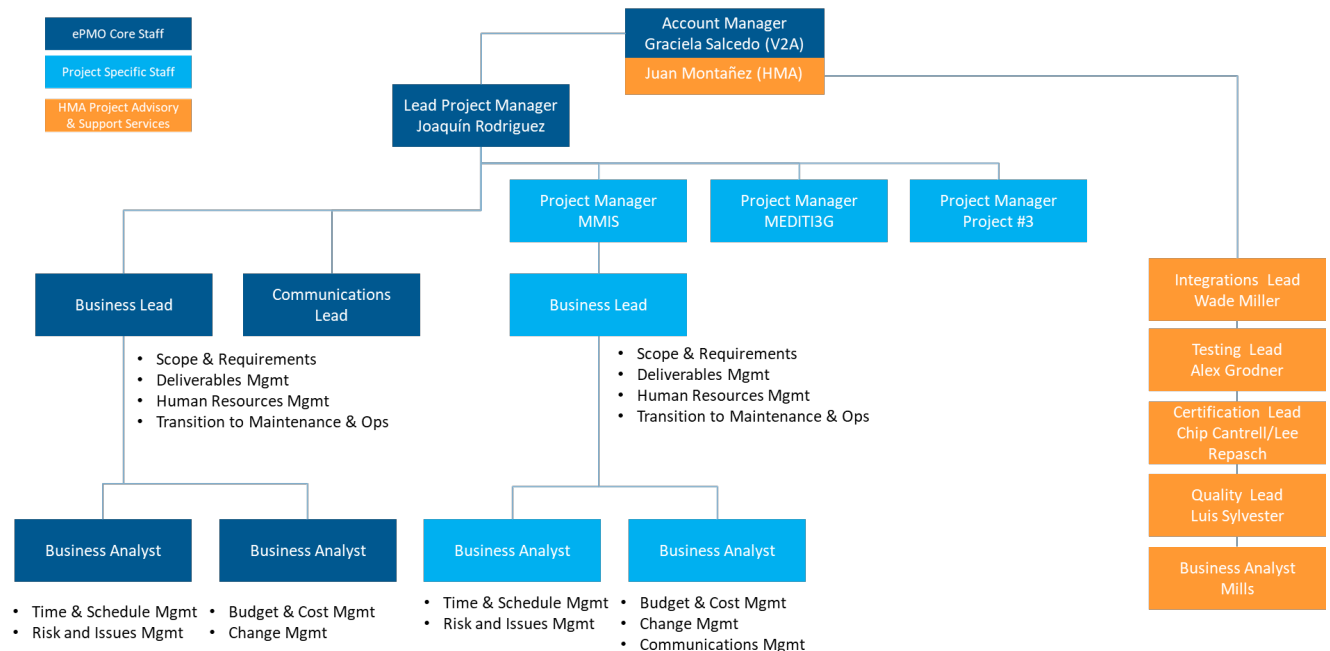
1. Initial Staffing Plan

V2A is proposing a team structure as shown in **Figure 6**. Graciela Salcedo (V2A Director) and Juan Montañez (HMA Director) will serve as Account Managers for this project. As Account Managers, we will

be responsible for overall delivery of the project and will be available to the PRMP throughout the life of the engagement. We will serve as the main liaison with PRMP throughout all the stages of the project.

Joaquín Rodríguez will serve as a full time Lead Project Manager. He will oversee a core Enterprise PMO staff as well as Project specific teams, starting with the MMIS project, then MEDITI3G and any others in the future.

Figure 6: Proposed ePMO Team



The core ePMO staff will be composed of two Business Leads, one dedicated to Communications Management and a PMP certified lead dedicated to the management of a consolidated vision of the MES projects' Scope and Requirements, Deliverables, Human Resources and Transition to Maintenance and Operations. These leads will be supported by two Business Analysts that will manage the more administrative tasks related to Time and Schedule, Risk and Issues, Budget and Cost, and Change Management. This core ePMO staff will establish governance and have visibility over all MES projects being implemented within the PRMP. They will be responsible for creating and harmonizing all "master plans" that need to be delivered and maintained by the ePMO, including the Master Project Schedule, Scope Management Plan, Deliverables Management Plan, Budget and Cost Management Plan, Communication Management Plan, Change Management Plan, Testing Plan, Quality Management Plan and Maintenance and Operations Transition Plan.

The ePMO core staff will be supported by a team of highly qualified HMA Subject Matter Experts and other technical resources, under the direction of Juan Montañez, in the areas of Project Integration,

Testing, Certification and Quality Management. The HMA team will interact continuously with the core ePMO staff.

Each project will have a dedicated project specific team composed of a Project Manager, a Business Lead and two Business Analysts. This team will be fully dedicated to the specific project, MMIS to begin with, then MEDITI3G and so on. They will follow all plans and processes developed by the ePMO Core Teams and will feed ongoing status reports to the ePMO level. The project teams will have at their service all ePMO core resources to support in any of the service areas as needed.

Additionally, the ePMO core team and project teams will have at their service a pool of SMEs from both V2A and HMA in areas including Project Management fundamentals, Medicaid program expertise, and MMIS and MEDITI3G technical expertise.

Table 12 shows a list of the proposed staffing plan for V2A and our subcontractor HMA, as well as the relationship to key PRMP resources that will be required to support the project. All key staff positions are indicated with an *. Graciela Salcedo and Juan Montañez will manage the relationship with the PRMP Director and Program Manager. The Lead Project Manager and each Project Manager for specific initiatives will work directly with Project Leads. The ePMO will work very closely with the PgMO staff to ensure alignment and knowledge sharing throughout the project, thus ensuring a smooth transition to internal resources during project closeout. Additionally, the Business Leads need to collaborate with key stakeholders from PRMPs legal, compliance, procurement, and contracts teams to ensure adequate management of scope and deliverables responsible by every vendor involved in each project. The Communications Lead will work closely with PRMP's Program Manager to anticipate and deliver any presentations required by federal or state agencies regarding status of the projects. Additionally, she will coordinate with the communication department to ensure any external communications are approved and follow PRMP standards. Managing budget and costs will require collaboration and alignment with PRMP's finance and accounting departments to ensure all vendors are invoicing according to budget and deliverables planned. Finally, the Integrations leader will collaborate with PRMP's technology department to ensure all technology platforms are seamlessly integrated into the department's architecture.

Table 12: Project Staffing & PRMP Roles

| Services | ePMO Core Staff | MMIS Project | PRMP Resources |
|--|---|------------------------------|----------------------------------|
| <ul style="list-style-type: none"> Account Management | V2A- Graciela Salcedo* HMA- Juan Montañez* | | PRMP Director Program Manager |
| <ul style="list-style-type: none"> Project Management | 1 Lead Project Manager* & 0.5 SME* (V2A) | 1 Project Manager (V2A) * | Project Lead |

| | | | |
|---|----------------------------------|--------------------------|---|
| <ul style="list-style-type: none"> • Scope and Requirements Management and Expertise • Deliverables Management and Expertise • Human Resources Management and Expertise • Transition to Maintenance and Operations Management | 1 Business Lead (V2A) * | 1 Business Lead (V2A) * | PgMO Legal Compliance Contracts Procurement |
| <ul style="list-style-type: none"> • Communication Management and Expertise | 1 Communications Lead (V2A)* | | Program Manager Communications |
| <ul style="list-style-type: none"> • Time and Schedule Management and Expertise • Risk and Issues Management and Expertise | 1 Business Analyst (V2A) | 1 Business Analyst (V2A) | |
| <ul style="list-style-type: none"> • Budget and Cost Management and Expertise • Change Management and Expertise | 1 Business Analyst (V2A) | 1 Business Analyst (V2A) | Finance & Accounting |
| <ul style="list-style-type: none"> • Integration Management and Expertise | 0.5 Business Lead (HMA)* | | Technology |
| <ul style="list-style-type: none"> • Testing Management and Expertise | 0.5 Business Lead (HMA)* | | |
| <ul style="list-style-type: none"> • Quality Management and Expertise | 0.5 Business Lead and SME (HMA)* | | |
| <ul style="list-style-type: none"> • Certification Management and Expertise | 0.5 Business Lead and SME (HMA)* | | |

2. Use of PRMP Staff

Our role is to setup an effective and efficient ePMO in order to minimize the time and effort required from the PRMP staff. During the first 30 days of the project, PRMP staff will be required to approve key deliverables included in the statement of work, mainly the Project Management Plan with all of its components and the Master Project Schedule. Throughout the project, PRMP staff will be required to review every weekly and monthly project status report as well as all meeting minutes. Whenever presentations have to be prepared for federal and state agency reviews or to present to PRMP management, PRMP staff should be available to review and approve these communications. During the project closeout, PRMP staff will be required to actively participate in all knowledge transfer activities. For all of these interactions, V2A will setup LEAN processes for seamless collaboration that will ensure PRMP resources can focus their attention more on key tasks and priorities, rather than administrative burdens.

More specifically, we anticipate that our team would interact with PRMP and other Government of Puerto Rico project stakeholders as follows:

- Our account managers would have direct access to the PRMP project lead and the PgMO lead to ensure timely discussions of overarching concerns about the various MES projects
- Our lead project manager would interact continuously with the PgMO and the PRMP counterpart to ensure risks and issues identified by the ePMO are discussed early and addressed in a timely manner

We also anticipate PRMP staff will be involved in project activities to the extent they have been involved to date; for instance, resources that have been identified as testers would retain that responsibility. Our value-add emanates from our ability to optimize the management of the project such that:

- Those resources know with enough lead time when they need to participate in MES project activities, with greater clarity as to their roles and expected contributions,
- Everyone working on the project has timely access to information about the project by delivering effective communication through multiple channels, and
- Where applicable, we assume the responsibility for functions which presently are spread across multiple PRMP and other government resources which do not have the requisite bandwidth.

3. Key Staff, Resumes and References

V2A's high caliber team has experience from leading consulting firms including McKinsey & Co. and Ernst & Young, among others. 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.

V2A will source staff for this project from its current bank of resources at the Project Manager level, Business Lead and Business Analyst levels. **Table 13** includes a list of the available resources that could be leveraged for this project. In addition, V2A has the capability to quickly scale up in adding more resources to create additional project teams as needed. All our resources have the proven experience to succeed in their roles and are bilingual and bi-cultural, thus easily able to navigate amongst all stakeholders in this project in both English and Spanish. The table also includes the pool of HMA resources that will serve as leads and SMEs in more technical service areas.

Table 13: Proposed staff and Roles

| Name | Proposed Role | Experience in Proposed Role |
|--------------------------|----------------------|--|
| Graciela Salcedo | Account Manager | Over 20 years of experience leading projects, including 1.5 years supporting PRMP with MEDITI3G Change Management and over 5 years leading strategic PMO for a managed care organization. Certified Scrum Product Owner. |
| Joaquín Rodríguez Kierce | Lead Project Manager | Over 15 years of project management experience, 10 in large healthcare organization. Six years of experience developing PMO offices. Certified Scrum Product Owner, Certified Scrum Master and former certified PMP. |
| Lorraine Martinez | Project Manager | Over 5 years of experience in portfolio and project management. Certified Scrum Product Owner. |
| Geraldine Rodríguez | Project Manager | Over 5 years of consulting experience, including establishing a PMO for a managed care organization. Licensed architect. Certified Scrum Product Owner. |
| Hernan Miranda | Project Manager | Certified PMO with over 3 years of experience in managing agile implementations of technology projects. |
| Malu Blázquez | Business Lead | Certified PMP with recent experience in MEDITI3G OCM project and over 25 years of experience in managing projects |

| | | |
|--------------------|--------------------------------|---|
| José Pérez | Business Lead | Project engineer with over 3 years of experience managing projects, including experience managing PRMP projects |
| Carmen Denton | Business Lead | Recent experience coordinating all end user training for MEDITI3G |
| Margarita Gregorio | Communications Management Lead | Recent experience managing Communications Plan for MEDITI3G |
| Cristina Quiñones | Business Analyst | Minor in Project Management and 2 years of experience in PMO in Telecom industry |
| Yinaris Guzman | Business Analyst | BA with 2 years of planning and project management experience in healthcare |
| Jesús Hernández | Business Analyst | BA with 2 years of experience in technology related industries. Previous experience with the Dept. of Health in developing Grants Management Optimization tool |
| Mauricio Paniagua | Business Analyst | BA with 2 yrs of experience, including with PRMP in the MEDITI3G OCM project |
| Marlene de Varona | PM Subject Matter Expert | LEAN Master Black Belt with over 15 years of experience, including setting up and leading PMO in pharma industry. Previous experience as SME for the MEDITI3G OCM project |
| Paul Cohen | PRMP Subject Matter Expert | 1.5 years leading the team that supported PRMP's Organization Change Management efforts with MEDITI3G. Expert in organizational design, training, and development. |
| HMA Staff: | | |
| Juan Montañez | HMA Account Manager | Engineer and MBA with more than 25 years of experience leading health and human services information system projects. More than 20 years of experience leading MES projects in Florida, Georgia, Hawaii, Indiana, Iowa, New Mexico, South Dakota, Tennessee and the U.S. Virgin Islands. Extensive Puerto Rico health and human services experience beginning in 2010: led the consulting team that worked with ASES on the MiSalud program implementation, then led the team that worked with the Department of Health and ASES on the health insurance exchange feasibility assessment project. |
| Wade Miller | Integration management lead | More than 25 years of experience leading MES projects. Former CIO of Georgia's Department of Community Health (Georgia Medicaid); led the implementation of an MMIS in Georgia; led the development of the strategy and procurement for replacing South Dakota's eligibility and enrollment system with the IBM Curam platform (system integrator: Redmane). |
| Alex Grodner | Testing management lead | Almost 10 years of experience leading health and human services information system testing activities including development and execution of testing plans; serving as testing manager for the implementation of South Dakota's |

| | | |
|----------------|-------------------------------|---|
| | | eligibility and enrollment system with the IBM Curam platform (system integrator: Redmane). |
| Luis Sylvester | Quality management lead | More than 20 years of health and human services policy, program design, implementation and operations experience. Served as Governor John deJongh's point-person during the implementation of the first MMIS in the U.S. Virgin Islands; then transitioned to the role of account manager for Gainwell's MMIS contract in the U.S. Virgin Islands. This gives Luis a true 360-degree view of quality management for a large-scale MES implementation. |
| Chip Cantrell | Certification management lead | More than 25 years of experience supporting or leading health and human services information system projects, including MMIS and eligibility and enrollment system implementations. Currently serving as deputy project manager and certification lead for the implementation of South Dakota's eligibility and enrollment system with the IBM Curam platform (system integrator: Redmane). |
| Lee Repasch | Certification management SME | More than 25 years of health and human services policy, program design and implementation experience. Served as a health IT subject matter expert at CMS. |
| Annie Mayol | Quality management SME | Former chief of staff to Puerto Rico's health secretary and former federal affairs advisor to the Governor of Puerto Rico. More than 20 years of government experience, including more than ten years of experience in health and human services in Puerto Rico. |
| Joe Moser | Quality management SME | Former Indiana Medicaid director who worked closely with Gainwell to implement MMIS changes in support of major Medicaid program improvement initiatives. More than 20 years of health and human services program experience. |
| Jamie Titak | Quality management SME | More than ten years of experience in health and human services including project leadership roles. |
| Athena Mills | Business Analyst | More than five years of experience in health and human services information system projects, with a focus on testing management and project administration supports. |

3.1 Resumes



Graciela Salcedo Canto

DIRECTOR

Overview

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

Skills

- Fluent in Spanish and English, proficient in French
- Certified Scrum Product Owner
- Board of Directors President at Juan Domingo en Acción, non-profit community-based organization
- Interviewer member of the Penn Alumni Interview Program
- Avid runner and yoga

Professional Experience

V2A Consulting | 2006 – present

Director, San Juan, PR

- Leads 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 monitored progress of implementation of all initiatives.
- Extensive experience leading strategic planning processes for multiple clients in banking, insurance, retail, CPG and nonprofit sectors, including: the largest conglomerate of Medicare Advantage, health, life, property and casualty insurance in PR with \$2.4billion in revenues; a local food distributor with a 100yr history and \$290M in revenues; the principal importer and distributor of sugar in PR with over \$115M in revenues; a Venezuelan multinational bank entering the PR market; and a retail business with design, sales and export operations in PR and Venezuela with over \$50M in revenues.
- Led a team in facilitating a digital transformation journey within the Operations division in Puerto Rico's largest bank, including mapping of operational processes, integration of various departments and facilitating a cultural transformation.
- Led a client re-engineering team in identifying close to \$4M in process efficiency opportunities from the implementation of a common lending platform in consumer and commercial credit operations of Puerto Rico's main bank (over \$35 billion assets).
- Led a team of five consultants in performing an in-depth diagnostic of various government agencies with budget of \$394M under the economic development secretary which led to multiple efficiency enhancement measures and an organizational restructuring recommendation with an impact of \$30M+ in cost reduction and revenue increase.
- Developed a profit improvement program for a local mortgage bank and a retail bank, including branch performance monitoring systems, cost reduction and productivity enhancement recommendations, process documentation and strategic communications.

Other experiences

Procter & Gamble | 1999-2006

Brand Manager, San Juan, PR

Xerox | 1993-1998

Technical Program Manager, Rochester, New York

Education

2019 | Harvard Business School

Leading Professional Services Firms; Cambridge, MA

1998 | Rochester Institute of Technology

Master of Engineering in Industrial Engineering; Rochester, NY

1994 | University of Pennsylvania

BS in Mechanical Engineering; Philadelphia, PA



Joaquín Rodríguez

ENGAGEMENT MANAGER

Overview

20 years of healthcare and telecom experience transforming organizations through strategic planning, project management and cultural transformation.

Professional Strengths

- Ability to build and maintain good relationship with client's
- Excellent verbal and written skills
- Effective, Efficient and Fast Learner
- Work well under pressure
- Committed team player, team builder and intrapreneur

Certifications

- PE, Professional Engineer License #21,602
- Former PMP, San Juan Chapter
- Certified Business and Life Coach
- Certified Scrum Product Owner
- Certified Scrum Master

Professional Experience

V2A Consulting | 2018 – present

Engagement Manager, San Juan, PR

As an Engagement Manager, managed multiple projects in the healthcare, telecom, and public sectors.

In the healthcare industry, led several projects for a leading HMO to:

- Streamline the effectiveness of the sales and promotions operations
- Conceptualize and design a team-based care program in outpatient clinic
- Manage the key initiatives portfolio with Executive reporting

In the telecom industry, managed a multi-year post-merger integration project as part of the Integration Management Office. Responsible for overseeing the key projects applying the Agile Scrum and PMI framework, creating, and deploying the Executive Program Reporting Tool.

MMM Healthcare | 2008-2017

AVP, Vitacare Clinics & Director of Strategy, San Juan, PR

As the Assistant Vice president of Clinics, led the development, implementation, and expansion across the island of a network of 9 clinics under a team-based care model for MA patients with chronic conditions in coordination with Medical Groups.

As the Director of Strategy, participated in the creation and development of the enterprise PMO organization and managed strategic projects for the Plan, MSO, and ACO.

- Managed the product development and Bid submission project. Designed and managed the operational readiness program for the MA Annual and Open Enrollment Periods.
- Designed and managed cultural transformation projects for the Plan and MSO.
- Designed and implemented the Provider Services area transformation project.
- Managed day-to-day operations of the Accountable Care Organization (ACO).

Evertec | 2005 – 2008

Project Portfolio Engineer, San Juan, PR

As a Project Portfolio Engineer in the PMO office, developed and implemented a Project Portfolio Management methodology to analyze, justify and prioritize strategic projects in all markets. Implemented and customized Computer Associate's eProject as the company's repository and reporting application. Trained key employees in all departments on the methodology application. Part of the team in charge of the cultural transformation project, aligning all departments' project portfolios to strategic needs.

Education

1995-2001 | Universidad Pontificia Comillas

Bachelors and Master's degree in Industrial Engineering, Specializing in Organizational Management ICAI School of Engineering; Madrid, Spain



Lorraine Martínez Neris

ENGAGEMENT MANAGER

Overview

Combine design thinking, analytics and managerial skills to design and implement feasible and sustainable solutions to deliver and monitor the expected outcomes.

Skills

- **Computer skills:** MS Visio, MS Power BI, VBA, Arena, Simio, Auto CAD & Google SketchUp
- **Essential Skills:** volunteering & service experience, team worker
- **Languages:** Spanish (Native), English (Fluent)

Professional Experience

V2A Consulting | 2016 – present

Engagement Manager, San Juan, PR

- Over five years of experience in project management, strategic planning, and project portfolio management
- Conceptualization and operationalization support of Clinical Integrated Care Units to manage Vital population
- Dashboard design for KPIs tracking for MOC (Model of Care) for Medicare Special Need Population
- Provide process improvement services with a focus around the client following the LEAN methodology approach in various industries

Banco Popular de Puerto Rico | 2013-2014

Industrial Engineer, Guaynabo, PR

- Process time reduction of -12% of mortgage cancellation process for regulatory compliance

Banco Popular de Puerto Rico | 2012

System Simulation Project, San Germán, PR

- Representation of System Modeling of current and future states using Simio, Simulation Software.

Other experience

Erie Veterans Affairs Medical Center | 2012

Systems Redesign Intern, Erie, PA

LifeScan – Johnson & Johnson Co. | 2012

Layout & Facilities Design Project, Aguadilla, PR

Fenwal Inc.– Johnson & Johnson Co. | 2012

Work Measurement Project, San Germán, PR

Education

2007-2013 | University of Puerto Rico Mayagüez Campus

B.S. Industrial Engineering, Mayagüez, PR

2014-2015 | University of Florida

ME, Engineering Management, ISE Dept., Gainesville, Florida

Certifications

2021 | Scrum Alliance Inc.: Certified Scrum Product Owner (CSPO)

2013 | NCEES: Engineering Licensure Fundamental Exam: approved

2010 | American Society of Quality (ASQ): Lean Six Sigma Yellow Belt



Geraldine Rodríguez

ENGAGEMENT MANAGER

Overview

Licensed Architect and Engagement Manager experienced in contract management, design coordination, logistic planning, scheduling, capacity assessment, strategic planning, and process improvements

Certifications

- **Certified Scrum Product Owner**, Scrum Alliance, 2020
- **LEED AP**, United States Green Building Council, 2009
- **OSHA Certification**, US Department of Labor, 2009
- **Registered Licensed Architect**, CAAPPR, 2008
- **Certification for Construction Change Orders**, Weinstein-Bacal & Miller, 2007
- **CDT**, Certification for Masterformat 2004 Edition, Construction Specifications Institute, 2006

Professional Experience

V2A Consulting | 2017 – present

Engagement Manager, San Juan, PR

- Co-led a human resource capacity assessment for an electric utility company of approximately 5,500 employees and provided recommendations and initiatives to impact current staffing needs.
- Provided process improvement services with a focus around the client by following LEAN methodology approach at major Payment Services company.
- Conducted analysis to identify operational and strategic projects needed as part of establishing and executing a PMO at major insurance company. Monitored progress and provided visibility to company executives of the strategic project portfolio.
- Leads multi-area/integrated workshops to enable the necessary brainstorming for new initiatives to be developed.
- Supported business areas in developing budget needs for the strategic initiatives and developed success measures and objectives to demonstrate the impact of the planned initiatives.

Office of the Governor of Puerto Rico | 2015-2016

Executive Assistant Chief of Staff, San Juan, PR

- Collaborated with the Governor's advisors to monitor compliance with the public policy established by the administration within all the government agencies and public corporations.
- Oversaw the fiscal working group and the execution of diverse policy measures implemented to ensure the continuation of essential services. Collaborated with the team to establish the path towards economic recovery with the development of the Fiscal Plan. Participated in meetings and supervised tasks and progress with various fiscal agencies and the federal government.
- Established and managed working plans for health, education, infrastructure, and fiscal affairs. Assigned tasks to others with clear goals, guidelines, and timeframes.
- Resolved staff related disputes regarding conflicting policies.
- Analyzed and developed recommendations from the advisors to implement policy decisions.

Other experience

Economic Development and Fiscal Affairs | 2013-2015

Deputy Advisor, San Juan, PR

Education

2000 | **University of Florida, School of Architecture**

B.A. in Design 2000, Florida

2004 | **University of Puerto Rico**

Masters in architecture, Río Piedras, Puerto Rico



Hernán Miranda, PMP

PROJECT MANAGER

Overview

Project management professional with over 3 years of engineering experience in regulated and technology industries. Responsible for customer support, account success and continuous improvement.

Skills

- Project Manager, PMP
- LSS
- Windows
- OSHA
- AutoCAD
- Minitab
- Matlab
- FDA Regulations
- ISO Standards
- Smartsheets
- Salesforce

Professional Experience

Rock Solid Technologies | 2021 – present

Project Manager, San Juan, PR

- Managed agile project implementation of **Microsoft Dynamics 365** for a customer with **700+ users** and revenue of **\$1.5M**.
- Drove direct engagement with stakeholders, development team and upper management by serving as a **facilitator** when deploying a customized product that met CRM quality metrics.
- Lead quality audits to product's performance by developing user acceptance testing (**UAT**) when configuring and deploying.
- Analyzed **KPIs** of simultaneous projects for projections in monthly business reviews given to the internal executive team.

Abbott | 2020 – 2021

Supplier Quality Engineer, Barceloneta, PR

- Initiated a high impact project of a new raw material validation by leading multifunctional teams in **two sites (PR & TEM)** for implementation.
- Gathered requirements from stakeholders, established communication management plan, defined scope of work (**SOW**) and created a project charter.
- Maintained a healthy and proactive vendor relationship to assure supplier's quality system followed material requirements.
- Served as **Scrum Master** in the planning and execution phases of the project when utilizing a waterfall methodology.

Medtronic | 2020

Quality Application Specialist, Humacao, PR

- Assisted in the planning phase of a Supplier Quality Engineering (**SQE**) project that consisted in the transfer in and out of various products to increase manufacturing capacities.
- Conducted statistical analysis, performed evaluation of validation reports, reviewed batch records and assured product configurations met quality standards.
- Developed, reviewed, and approved technical quality documents for regulatory approval requirements as part of the **integration management plan**.
- Collaborated with multidiscipline teams in brainstorming sessions during multiple **sprints** to achieve project success.

Education

2020 | Polytechnic University of Puerto Rico

Bachelor of Science in Biomedical Engineering



María de L. Blázquez

ASSOCIATE

Overview

Executive professional with vast experience and knowledge in operations management, program and project management, and process and performance improvement. Industrial and Management Engineering background with over 25 years of professional work experience that includes leading organizations, performing management consulting in process and performance improvement, as well as managing various types of development opportunities from the planning and permitting phase of concept through execution and build-out.

Skills

- Project Management Professional (PMP) Certification
- Leadership, program and project management, writing, negotiation, and supervisory skills, as well as experience in soliciting and managing federal funds.
- Software Tools: Word, Excel, PowerPoint, Publisher, Microsoft Project, Visio, CRM.
- Fully Bilingual in English and Spanish.

Professional Experience

V2A Consulting | 2021 – present

SME, San Juan, PR

- Provides strategic management consulting & advisory services and project management services to nonprofits, private and government clients within various industries. Provides advisory services, project management services and continuous improvement and optimization services for client operations. Participated in teams leading change management initiatives in the Healthcare Industry and capacity management efforts in a government agency. Also developed project implementation plans for a major telecommunications company.

ReImagina Puerto Rico, Inc. | 2020

Executive Director, San Juan, PR

- Responsible for leading a non-profit, independent initiative that developed 97 actionable recommendations & 4 guiding principles for how to use post-Hurricane Maria recovery funds to help rebuild Puerto Rico in a way that makes the Island stronger and better prepared for future challenges. Implemented an ample participatory process in an accelerated timeframe to produce the ReImagina Reports, which were referenced in the PR Government's Economic and Disaster Recovery Plan and the Department of Housing's Disaster Recovery Action Plan for CDBG-DR funds adopting approximately 66% of our recommendations. Provided leadership and support in key reforms and collaborative initiatives that foster resiliency and sustainability in key infrastructure sectors for the long-term reconstruction of Puerto Rico, specifically in the Energy, Housing and Water sectors; and fostering investments and best practices that maximize equity, inclusiveness, collaboration, transparency, and social well-being in the recovery implementation.

Other experiences

Fundación Borincana, Inc. | 2020

Mentor PRECAP program, San Juan, PR

Roosevelt Roads Local Redevelopment Authority (LRA). | 2013-2016

Executive Director, San Juan, PR

CSA Group Inc. | 2001-2013

Project Manager, San Juan, PR

Education

1992 | **Rensselaer Polytechnic Institute**

Master of Science, Industrial & Management Engineering, Management of Technology Concentration; Troy, NY

1991 | **Rensselaer Polytechnic Institute**

Bachelor of Science, Industrial & Management Engineering, Minor in Philosophy; Troy, NY



**José
Pérez**
ASSOCIATE

Overview

Mechanical engineer with over four years of experience in various industries. Responsible for coordinating different project management teams, designing, and developing engineering projects and quality assurance tests.

Skills

- Fully bilingual (English and Spanish) and proficient in mandarin level I.
- Computer literate in Microsoft Suite software including EXCEL(macros and quality control distributions)
- Proficient with CAD software design, modeling and simulations(AutoCAD, Pro-E and Solid Works)
- Experience with C++, VBA and Mat Lab programing languages
- Project Management software SAP and Agile

Professional Experience

Smart Precise Solutions/Medtronic | 2020 – present

Project Engineer, San Juan, PR

- Collect project requirements, defined objectives, and deliverable acceptance criteria(SOWs), Identify organization's applicable policies & procedures for implementation(ISO, CFRs, etc...).
- Prepare project management plans for review and approval by client, identifying risk/analyze and develop mitigation plans, determine QC standards & metrics, monitor/control approved budget. Plan and execute Test Method Validations. Monitor on site work by laborers(welding, maintenance, LOTO, construction.
- Perform progress review meetings with suppliers/contractors, RFI's, solicit vendor proposals through bidding process & perform analysis for recommendation, communication with stakeholders. Follow up on contractors for compliance with applicable regulations(OSHA, PPE, etc...), work schedule and quality of work.
- Provide project turnover package to client, ensure project capitalization with finance department, ensure no pending change orders and invoices from suppliers/contractors.
- Process development and validation for manufacturing of medical devices(IQ, TMV, CSVP, PDR).

ACT-Solar/Windmar Home | 2020

Business Development Representative

- Seeking out and informing clients about their options regarding energy usage and helping them to develop systems to improve their efficiency.
- Conducting field and feasibility studies.
- Analyzing the client's usage of energy during previous years and collecting data.
- Calculating specifications for solar panel array that satisfies the client's needs.

Intervoice Consulting | 2019

Project Coordinator

- Research and assemble information and supporting data in preparation for meetings, work projects, reports, and presentations to clients PRMP(Puerto Rico Medicaid Program), PRDOH(PR Dept. of Health) and CMS.
- Preparation of invoice packages, proposals, and similar documentation.
- Document quality and document management for auditing purposes.
- Provide coordination in execution of project related meetings.

Education

2018 | **Polytechnic University of Puerto Rico**

Bachelor's Degree in Mechanical Engineering

2016 | Lean Six Sigma certification

2006 | CompTIA A+ certificate



Carmen Denton

ASSOCIATE

Overview

Ivy League institution graduate and well-rounded leader, with a signature contribution of maximizing program and department potential in efficiency, goal attainment and adherence with regulatory requirements. Experience in the private sector, government, and nonprofit organizations, managing multimillion dollar grants and driving high impact initiatives, for diverse populations as well as process development.

Skills

- Project Management
- Analytical Thinking
- Policy Making
- Process Development
- Human Resources
- Employee Relations
- Training
- Public Affairs
- Communications
- Strategy Problem Solving
- Proposals and Grants Analysis

Professional Experience

V2A Consulting | 2020 – present

SME, San Juan, PR

- Supported implementation of ongoing training for MEDITI3G, as well as reinforcement initiatives to ensure the desired mindsets and behaviors are adopted
- Provided on-going coaching support to manage transition and adoption of changes
- Ensure end users know how to use the new implemented system (MEDITI3G) correctly leading to improved customer service

ABRE PR | 2020-2021

Project Director, San Juan, PR

Direct supervision and guidance, development of tasks and definition of deliverables for the completion of two independent investigations and reports related to PR Public School System:

- Education Gap Analysis: A Case Study Approach (2021)
- What are the organizational and psychosocial needs affecting the general well-being of the school principals of public schools in Puerto Rico? (2021)

Education Department of Puerto Rico | 2017-2019

Chief of Staff, San Juan, PR

Direct coordination communications, employee relations and monitoring of internal projects and the institutional program, among other initiatives, for the largest agency, with 41,000 employees across seven regions.

- Contributed to the development and implementation of one of the most complex institutional reforms:
 - o Ensured integration and alignment across all areas, prepared communications, and presentations to address the entire workforce.
 - Harmonized agenda and strategies for program execution.
 - Instilled a culture of discipline and punctuality.
 - Served as internal facilitator to manage the reengineering impact and cultural transformation.
 - Implemented a decision-making process based on facts and data.
 - 20% of Reform and transformation milestones achieved to date.
- Resolved issues identified by driving process improvements to match execution with intent.

Education

Villanova University

B.A. in Secondary Education, concentration in Social Studies Certification in College Counseling; Online

Columbia University, Teachers College

Master of Arts, Learning Disabilities; New York, NY



Margarita Gregorio

COMMUNICATIONS SME

Overview

Energetic, creative, self-motivated /driven professional offering a proven background within the Marketing industry. Proven ability to drive Sales & Marketing with strategic planning, communication, presentation and analytical proficiencies and a penchant for perfection, focus and follow-through.

Skills

- Consistently demonstrate initiative and self-motivation to meet and exceed company goals.
- Solid analytical, problem solving, presentation and organizational skills.
- Fully Bilingual (*English Spanish*)
- Computer Skills: MS Office (MS Word, MS Excel, MS Power Point & MS Outlook)

Professional Experience

V2A Consulting | 2020 – present

SME, San Juan, PR

- Developed and executed Communications Plan for the implementation of MEDITI 3G
- Developed Trade Marketing activities, POP material and promotional programs for Key Accounts such as: Walgreens, Walmart, as well as local accounts
- Marketing consultant: developed marketing strategies and plans for specific brands
- Event Producer with ACENTO for Coors Light Circotic, Coors Light Soundfields
- Advertising and promotional campaigns to ensure the success of the brands and events
- Responsible for the assigned budget of the different projects.
- Worked with brand image, implement promotional programs, and provide them the marketing guidelines of each brand.
- Prepare business plans for new products launches and promotions by analyzing retail price, estimated sales, forecast and Gross Margin.
- Prepare and monitor the sampling, promotional sets, and seasonal programs budget
- Prepare presentations to management and sales force with the detail of new programs and their marketing strategies.

Energizer | 2008

Senior Product Head, San Juan, PR

Developed marketing plans and strategies for the assigned brands for Puerto Rico, Outer Caribbean, and Central America. (Playtex, Banana Boat, Hawaiian Tropic, Schick, and Wet Ones)

(Sun Care, Feminine Care, Infant Care, Razor & Blades, Gloves)

- Responsible for the assigned budget for the different regions: Puerto Rico, Outer Caribbean, and Central America.
- Worked directly with our regions distributors to maintain the brand image, implement promotional programs, and provide them the marketing guidelines of each brand.
- Prepare business plans for new products launches and promotions by analyzing retail price, estimated sales, forecast and Gross Margin.
- Prepare and monitor the sampling, promotional sets, and seasonal programs budget, forecast, pricing and allocation.

Education

Universidad del Sagrado Corazón

MBA: Major Marketing; Santurce, PR

2002 | Duquesne University

Bachelor's degree: Major Communications. Minor Italian; Pittsburg, PA



Cristina Quiñones

BUSINESS ANALYST

Overview

Demonstrate my knowledge and skills through my Business Analyst experience to identify critical problems needed to be resolved, improve product quality, achieve cost reduction, adding value to product and increase profit.

Skills

- Microsoft Office Word, PowerPoint and Excel
- Excellent interpersonal and communication skills
- Bilingual (Spanish and English)
- Excellent attention to detail

Professional Experience

V2A Consulting | 2020 – present

Business Analyst, San Juan, PR

Telecommunications

- Supported process improvement services with a focus around the client by following LEAN methodology approach at major telecommunications company.
- Lead the project management of customer experience initiatives portfolio and provided visibility to company executives.

Telecommunications

- Conducted assessment to identify gaps in new customer migration process of a major telecommunications company.
- Co-led the re-design of the customers' journey for this new process, identifying initiatives to make it operationally possible, while ensuring the orchestration of 10+ stakeholders.

Cardinal Health | 2019

Layout Project, PR – Añasco, PR

- Generated clean room layout alternatives (CORELAP) that reduced total material transport distance by 22%-30%.
- Considered space restrictions such as non-relocatable machinery, area processes and validation implications.

UPRM's Public Transport System | 2019

Simulation Project, PR – Mayagüez, PR

- Gave recommendations to reduce trip time by 16.7% - 34.8% and restore system credibility.
- Analysed system with a model created in the simulation software SIMIO.

Global Brigades Fund Raising Support | 2019

Project Management Project – Mayagüez, PR

- Generated Project Charter, which included a scope overview, business case, milestones schedule with acceptance criteria, risk analysis, budget estimates and communication plan.
- Generated Project Planning, which included work breakdown structure, work packages, identifying a critical path, a Gantt chart, load diagrams and other tools and methods included in Project Charter.

Education

2021 | University of Puerto Rico, Mayagüez Campus (UPRM)

Bachelor of Science on Industrial Engineering, minor in Project Management; Mayagüez, PR



Yinaris Guzmán

BUSINESS ANALYST

Overview

Detail-oriented, problem solver Business Analyst with 2 years of experience doing meticulous and intensive work across multiple industries.

Skills

- SAP Software, Oracle,
- Demantra,
- JD Edwards EnterpriseOne Software,
- SQL,
- Excel,
- Microsoft Word,
- Power Point
- Microsoft Office

Certifications

- Cash Flow Management of your Business in Times of Crisis
- Personal Finance
- Life Coaching

Professional Experience

V2A Consulting | 2020– present

Business Analyst, San Juan, PR

- Collaborated in strategic initiatives to elevate the experience of the providers of a major insurance company
- Evaluation of the internal current state operational performance for a purchasing process in a public sector agency to facilitate the identification of opportunity areas for improvement.
- Development of the Customer Journey Map to improve and optimize customer experience.
- Collaborated in Mergers and Acquisitions between two Telecommunications Industries.
- Performed analysis and recommendations on the data of Fleet and Facilities, Network Infrastructure.

Seo's Shop | 2018-present

President, PR

- Stainless steel jewelry MLM company where we have more than 170 ambassadors, increasing sales by 100% in one year.
- Manage inventory, workshops for ambassadors, suppliers, human resources, accounting, warehouse, customer services, marketing, and costs.

Ethicon Endo Surgery Johnson & Johnson | 2018-2019

Planning COOP

- Managed global demand forecast and order management process for Basic Energy & Capital portfolios.
- Supported customer service impact by monitoring orders & inventory to avoid backorders in the regions.
- Solved situations as end-to-end planner in the supply chain, such as suppliers, finance, demand, customers.

Other experience

Integra LifeSciences. | 2017-2018

Work Measurement

Education

University of Puerto Rico, Mayagüez Campus

Bachelor of Science in Industrial Engineering, Minor: Project Management; Mayagüez, PR



Jesús Hernández

BUSINESS ANALYST

Overview

Business analyst with two years of experience designing and optimizing business processes. Worked with teams of 5-15 people across technology, data science, business, government, and healthcare industry.

Skills

- Microsoft Office 365
- Fully Bilingual in Spanish and English
- STATA
- Gretl
- Oracle
- Illustrator
- InDesign
- Social Media

Professional Experience

V2A Consulting | 2020 – present

Business Analyst, San Juan, PR

- Support on monitoring tool development and required enhancements to ensure completion based on identified dependencies and established due dates.
- Developed Power BI to provide visibility on personnel availability and overtime usage within each department and position in the organization
- Absenteeism analysis to identify opportunities and common trends to determine initiatives and target goals moving forward to control usage
- Analyzed grant management workload within various Health Departments
- Developed grant management toolkit for ASTHO (Association of State and Territorial Health Officials) to guide Health Departments in implementing and sustaining a more centralized Grants Management Office to maximize federal funding outcomes
- Developed self-assessment forms and parameter calculations in Microsoft Power Apps format to gather user input and produce output forms that provide visibility of the workload managed, opportunities identified in staffing configurations, organizational framework recommended and cost allocation within funded Health Programs
- Developed tutorial guides and videos for toolkit users, considering data and tool configuration and operation of input and output forms

Oracle NetSuite | 2020

Business Development Representative; Cambridge, MA

- Responsible for compiling industry research and developing relationships between companies and Oracle NetSuite's business software solutions.
- Maintain up to date system logs to expand the success of the sales cycle.

Prosperity Now | 2019

Savings & Financial Capability Internship; Washington, DC

- Compiled and analyzed data for the development of a product to help families save and build wealth. This was in assistance to the Savings and Financial Capability team which supports organizations in addressing the financial needs of their clients and communities to strengthen financial health and stability.
- Provided administrative, logistic and project support on many projects related to financial integration efforts and opportunities as well as data management and analysis focused on Financial Technology and the industry's relationship to the community of low-income Americans Prosperity Now aims to support.

Education

2020 | Providence College

Bachelor of Science & Arts: Economics / Political Science minor / Public Administration Certificate; Providence, RI



Mauricio Paniagua

BUSINESS ANALYST

Overview

Dynamic, responsible, problem-solver and committed Business Analyst with two years of experience in a variety of industries including healthcare and consumer goods.

Skills

- **Languages:** English, Native Spanish and advanced proficiency in French
- **Computer Skills:** Microsoft Office 365, Python, Java, SQL, basic R, C
- **Activities:** Undergraduate Latin America Business, Puerto Rican Association Club, Volleyball Club player
- **Interest:** Exercising, Conversating, Literature, and Traveling

Professional Experience

V2A Consulting | 2020 – present

Business Analyst, San Juan, PR

Healthcare – Process Improvement

- Devised a model in the healthcare industry that projected the agency's capacity to process recurring, modified, and new applications.
- Created a User Interface through a Macro in Excel that facilitated the recollection of employee performance
- Lead a pulse survey of the agency regarding the processes and the feel of the employees

Government - Procurement Reform

- Classified more than 30,000 medical items (devices, IVs, drugs, etc.)
- Developed a presentation with insights and projections of usage of the previous mentioned classification
- Developed and saw through multiple RFPs and bids for the agency

Nonprofit – Database Digitalization & Strategic Planning

- Created an app in the PowerApps platform for the digitalization, easier access, and KPIs of the organization's data
- Generated a Fact-Based approach and facilitated strategic planning sessions.

Retail – Strategic Planning

- Led the Process Improvement front of the project. Developed and published an Organizational Climate Survey. Organized and lead Focus Groups.
- Facilitated the Strategic Planning Sessions with the client

Parallel 18 Accelerator | 2018

Operations Intern, San Juan, PR

- Benchmarked Parallel 18 business model to other accelerators in North and Latin America to incorporate and compare best practices including possible curriculum changes and gaining market information
- Advised potential improvements to varying businesses' dilemmas such as: business' driver supply restructuring and possible implementation of new products
- Maintained communication with startups to review business plans, schedule mentor meetings and brainstorm ideas on existing predicaments
- Audited startups by reviewing business transactions and supervised the completion of the startup's requirements

Education

2020 | **New York University**

Bachelor of Science in Economics, Minor in Computer Science and French Studies; New York, NY

2016-2017 | **Boston University**

Bachelor in Business Administration; Boston, MA (Transferred)



Marlene de Varona

SUBJECT MATTER EXPERT

Overview

Chemical engineer Lean Six Sigma Master Black Belt with over ten years of experience in the **pharmaceutical and manufacturing industry**. Responsible for running a Project Management Office for a chemical plant (API) and its project portfolio. **Leader** of an **Operational Excellence** team in support of a chemical plant accountable for leading, implementing, and coaching Six Sigma, Lean Manufacturing, Lean Administration, Cultural and Lean Transformations, and Human Error Reduction tools and methodologies.

Skills

- Microsoft Office 365
- Brain training expert
- Cultural Transformations (Mindsets & Behaviors)
- Lean Six Sigma certified Master Black Belt
- Organizational Redesign
- Human Error Reduction
- Advanced Statistics and Mathematical modeling – Analytics
- Project Management & Project Portfolio Management (PMO)

Professional Experience

V2A Consulting | 2013 – present

SME, San Juan, PR

Present: Conducting trainings, certifications, workshops, and seminars as requested and managing or coaching Lean Six Sigma projects for V2A Consulting. Sample of projects:

- Methodology expert in support of training and change management related to a change in the operating system and technology used at PRMP offices to evaluate eligibility.
- Support a local bank in their design, implementation and roll out of a lean initiative to reduce the wait time in Queue at over 30 branches.
- Statistical analysis and modeling to predict cash level requirements for branch operations including automation of analysis and forecasting using R and SAS.
- Lean Expert to support a thorough digital transformation diagnostic of back-office process operations at a major banking institution in PR
- Managing an engagement to improve customer service, quality, and timing of delivery of a mailing operation at a technology company by implementing Lean methodology.
- Lead a full deep diagnostic of culture, organizational structure, and processes at the auto loans division of a major banking institution which lead to the creation of a transformation strategic master plan to conduct a full transformation because of the acquisition of another auto financing institution.
- Supported a Medical Devices Start-Up from the definition of vision, mission, and values to creating a strategy, a business plan, a cost structure, and a project plan to register with regulatory agencies as well as run the registration strategy by delineating and supervising the creation of SOPs for the entire operation.

Other experiences

Pfizer

- Operational Excellence Project Leader leading a team within Technical Services to conduct and coach projects related to six sigma, lean administration, lean manufacturing, human error reductions, and transformations, mindset, and behaviors.
- In addition, I performed portfolio management for all chemical plant projects and ran the Project Management Office for the chemical plant.
- I was a **Master Black Belt** in the Pfizer certification process which included training and coaching of Green Belt, Black Belt, Lean, Kaizen Leaders, Human Error Reductions, Transformations, Mindset and Behaviors, Project Management, Statistical analysis and Latent Variable Modeling.

Education

2015 | Villanova University

Lean Six Sigma Master Black Belt Certification

2004 | Universidad Inter Americana de PR

M.S. Environmental Evaluation and Protection; San Juan, PR

2002 | Massachusetts Institute of Technology (MIT)

B.S. Chemical Engineering; Cambridge, MA



Paul Cohen

ENGAGEMENT MANAGER

Overview

Solid background in corporate training & development, project management and process design, resource allocation and job scheduling in corporate and educational environments. Stable professional experience in client satisfaction, business planning and problem solving.

Certifications

Certificates in Myers-Briggs Type Indicator (Practitioner); Developing Leadership through Emotional Intelligence; Emotional & Social Competency Inventory Accreditation; Pearson-Marr Archetype Indicator; Human Performance Competencies.

Professional Experience

V2A Consulting | 2017 – present

Engagement Manager, San Juan, PR

Leading an engagement team, responsible for all dimensions of a project with a partner-like mindset: Leading the team's problem solving; Synthesizing conclusions into meaningful insights and recommendations; Building deep senior client relationships; Helping the team to work with client to implement solutions; Focusing on developing members with team coaching and feedback.

- Leading the Project to consolidate and reform incentives laws into Puerto Rican New Incentives Code.
- Leading the reorganization of the Puerto Rico Department of Economic Development and Commerce.
- Leading the change management efforts to implement a new core system in a Puerto Rico healthcare government agency

Ekantika, LLC | 2008-2017

Consultant, Santiago, Chile / Brazil, Miami

Catered for regional clients in Chile, Perú, Brazil, Mexico, Panamá and USA.

Customer Solutions Delivery: Analyzing contexts and diagnosing issues, individual and group coaching, and development activities.

Customer relationship management: Building long-term relationships, management of expectations, delivering value and acting as "advisor".

- Successfully and actively participating as a consultant on the LAN Airlines and TAM Airlines merger. Top ten largest merger in Latin America.
- Developed and delivered Cultural Differences Management, Conflict Management, Change Management Training programs for the top management of the LATAM Airlines Group
- Developed the RFI and RPF for the Contact Center revamp at the largest locally owned Caribbean Bank

The Cultural Imperative, LLC | 2010-2011

Researcher and instructional designer, SME and ID, Boston, MA

In charge of overseeing all research and development functions for assembling and delivering a guide and training program of state-of-the-art cultural competence techniques that are available. Utilize expertise in process identification, data analysis and executive reporting.

Education

2009 | **Universidad Católica Andrés Bello**

B.S. Degree in Industrial Relations, concentration in Human Resources, Caracas, Venezuela

2011 | **Suffolk University**

M.S. Degree in Organization Learning and Development, Certificate in Organizational Development, Boston, MA



Juan M. Montañez, MBA

MANAGING DIRECTOR, HMA

Overview

- Uniquely skilled in health care information technology (IT), financial planning, business process reengineering, and project management
- Expert in strategic planning, quality improvement and performance measurement, cost-benefit and return on investment analysis, and activity-based costing and acquisition management
- In-depth experience in planning, developing, and implementing IT modernization roadmaps for health and human services agencies, health plans and provider organizations, IT procurements, and readiness assessments

Professional Experience

Health Management Associates, Inc. | 2010 – present

- Led large-scale Medicaid Enterprise System (MES) projects with the state of South Dakota's Department of Social Services (DSS):
 - DSS enterprise IT roadmap development
 - Medicaid Management Information System (MMIS) go-forward plan development
- Supported MMIS projects in Indiana and Iowa; types of support included procurement/request for proposals development, MMIS vendor performance management and compensation model design, and evaluation of systems with which the MMIS in a particular state would have to interface
- Led the multi-phase Puerto Rico health insurance exchange feasibility assessment and planning project; key deliverables included an assessment of the uninsured and underinsured populations in Puerto Rico, a comprehensive assessment of the applicability of ACA provisions to Puerto Rico, an analysis of exchange-enabling business of technology capabilities across Puerto Rico government agencies, and recommendations regarding the optimal setup of an exchange in Puerto Rico consistent with ACA principles but sustainable given Puerto Rico's funding and resource constraints
- Served as IT and data analytics lead on a policy academy organized by the National Governors Association – which included Puerto Rico - designed to help seven state Medicaid agencies design and implement programs aimed at addressing the needs of Medicaid benefit "super-utilizers"
- Leading an independent verification and validation engagement with beWellnm, New Mexico's health insurance exchange; assisted beWellnm with the replacements of its contact center and Small Business Health Options program IT vendors
- Led the IT assessment and alternatives development phases of health insurance marketplace planning projects in the states of Connecticut and Illinois
- Led an eligibility system assessment and reengineering initiative with four counties in California, resulting in recommendations for ensuring the eligibility systems in these counties could support program changes resulting from implementation of the ACA
- Assessed the IT stack of Colorado's health insurance exchange; proposed changes designed to reduce operating costs and improve performance
- Led the teams that updated the state Medicaid health IT plans and health IT advance planning documents for the states of Indiana and Tennessee
- Served as HIT and health information exchange (HIE) consulting lead on Medicaid health homes program design projects in the District of Columbia, Ohio, and Rhode Island

Education

Georgia Institute of Technology; Master of Business Administration

Massachusetts Institute of Technology; Bachelor of Science, Aeronautics and Astronautics, Social Sciences Concentration in Economics



Wade Miller

PRINCIPAL, HMA

Overview

- More than 28 years of health information technology (IT) and policy, focused primarily on Medicaid/Children's Health Insurance Plan (CHIP), health reform, data, IT, and project management for both large-scale and small implementations of programs and IT solutions
- Extensive project management experience focused on large-scale IT solutions
- Extensive independent verification and validation (IV&V) experience in the Medicaid and Health Exchange settings
- Extensive experience in providing technical assistance to states implementing health IT, new programs and policies, health reform, as well as performing operational and technical assessments, including Medicaid Information Technology Architecture (MITA) assessments
- Experience leading teams, including managing, and directing state and vendor staff

Professional Experience

Health Management Associates, Inc. | 2012 – present

Areas of focus include project management, IT procurement and assessment, Medicaid policy, Medicaid managed care, health reform, economic assistance eligibility determination system procurement planning, Health Insurance Portability and Accountability Act of 1996 (HIPAA) Privacy and Security, Affordable Care Act (ACA) security standards, and the intersection of policy and information technology

Major projects include:

beWellnm Individual Exchange – IV&V Team

- As a part of the HMA IV&V team, support the beWellnm team and review all aspects of the project as well as recommend improvements to processes.
- Review and comment on all vendor deliverables
- IV&V Health Checks throughout the project (i.e. Gate reviews)
- IV&V Readiness Assessment for all stakeholders on the project within 60 days of proposed go live date which is currently October 1, 2021.

South Dakota – DSS Division of Medical Services - Advanced Planning Funding Resource – Medicaid Modernization Efforts – Primary Technical Resource over the past nine years for developing and renewing Advanced planning Documents for securing federal funding for DSS Medicaid projects. Working with the Medicaid IT liaison, Medicaid Director and Deputy Directors and other Subject matter experts as well as BIT:

- Develop new Planning APDs
- Develop new Implementation APDs
- Develop new Operations APDs
- Work on the APD renewals every year for existing APDs to secure funding for the upcoming Federal Fiscal Year.
- Assist the DSS Office of Finance with tracking and reconciling all federal budget information for DMS.

South Dakota – DSS Office of Licensing and Accreditation – System Modernization Project

- As a part of the HMA team, participate in meetings with DSS staff and gather information on existing licensing systems to provide DSS with options for automation of licenses. systems for Child Care, Foster Care and Behavioral Health provider licensing

Puerto Rico Health Benefit Exchange Assessment and Planning

- Participated as a member of the HMA team that worked with the Puerto Rico Department of Health to assess the feasibility of establishing a health benefit exchange in the context of Puerto Rico's limited exchange funding and its status as a US territory (numerous provisions of the ACA, including the "individual mandate," do not apply to territories) with a distinct internal revenue code and unique medical assistance program; work on this initiative began in December 2011 and was completed in May 2012

Education

Arizona State University, Bachelor of Science, Justice Studies



Alex Grodner

SENIOR MANAGER, HMA

Overview

Alex Grodner has devoted his career to assisting Medicaid, and Health & Human Service clients across the country provide better services for their citizens. His breadth of experience has included design, requirements analysis, testing, reporting, training, end-user readiness, Go-Live assistance, and production support for Public Service clients. With over ten (10) years of experience, Alex has worked on with some of the country's largest Medicaid and Health & Human Services departments. printer took a galley of type and scrambled it to make a type specimen book.

Skills

- **Computer skills:** MS Office Suite (Word, PowerPoint, Excel, Access, Visio, Dynamics), PowerBI, MS Teams & Sharepoint, Prezi, Oracle SQL Server, JIRA, Accompa & HPQC
- **Language & Coding Standards:** DAX, T-SQL, JAVA, C++, C#, HTML& Visual Basic

Professional Experience

South Dakota Eligibility & Enrollment System | 2020 – present

User Acceptance Testing (UAT) Lead, South Dakota

While at Cambria Solutions, Inc., Mr. Grodner is in the role of User Acceptance Testing Lead for the implementation of the new eligibility & enrollment system in South Dakota Department of Social Services (DSS).

- Creating full UAT plan; including entry and exit criteria, onboarding and training plan for testers, and creation and management of test scenarios and scripts
- Supplementing State leadership staff by providing system (Cúram), general eligibility & enrollment, basic policy, and testing expertise throughout the life of the project
- Reviewing and approving requirements and general design decisions proposed by the system integrator that will directly feed into UAT execution

Louisiana Medicaid Eligibility Determination System (LaMEDS) | 2020

Senior Business Analyst (BA) and UAT Onboarding Lead, Louisiana

While at Cambria Solutions, Inc., Mr. Grodner was integrated into the Scrum teams for Maintenance of the eligibility system. He began as a Senior BA identifying the As-Is and To-Be Process flows for the end-to-end defect and enhancement project and transitioned into the role of UAT Onboarding Lead for 25 first time testers.

- Created a comprehensive As-Is and To-Be process flow for the defect and enhancement process for the Scrum development teams; included six (6) separate work streams
- Managed the creation of a full Onboarding plan and all material for 25 new User Acceptance Testers in two (2) weeks; including project schedule/ milestones, four (4) full days of training material for first time testers, virtual simulation & assessment, and buddy system
- Received sign-off for all documentation and deliverables associated to the process flows and UAT Onboarding from LDH leadership

Other experiences

Provider Management and Asset Verification System Projects | 2019-2020

Project Manager, Test Lead, Louisiana

System Integration & Testing Team | 2019-2020

Public Service SME, Test Analyst

Education

The University of Alabama, Tuscaloosa, AL

Bachelor of Science in Business Administration



Luis A. Sylvester
QUALITY MANAGEMENT
LEAD, HMA

Overview

An experienced senior consultant with vast knowledge in the healthcare industry. Has worked both in the private and public sectors to problem-solve organizational and operational changes that have created solutions to the organization's needs.

Professional Experience

Sylvester Consulting Solutions, LLC | 2019 – present

Owner, St. Thomas, USVI

- Provided consultant services to assist HealthEC to pursue the establishment of Data Warehouse in the U.S. Virgin Islands
- Provided consultant services to Raindance LLC to obtain a Certificate of Need to develop two Skilled Nursing Facilities in the U.S. Virgin Islands
- Provided business development services to Demah Inc. to obtain a government lease to establish a gourmet market and warehouse complex.
- Provided political consulting services to Milton A. Potter, a current Legislator in the 34th Legislature of the Virgin Islands. Services include analyzing legislation, developing talking points, assisting with the development of press releases.

USVI Molina Medicaid Solutions/ DXC Technology | 2012-2019

Executive Account Manager, St. Thomas, USVI

- Oversaw the implementation of the First MMIS in the USVI, from a manual process to an automatic process
- Managed the \$26 million contract which saw the Medicaid population expand from 13,000 to 31,000
- Participated in National Medicaid Conferences promoting the West Virginia/US Virgin Islands Partnership with the MMIS
- Acted as a Liaison to the USVI's Legislature, Governor's Office, and the Department of Human Services

Office of the Governor | 2007-2011

Governor's Health Policy Advisor, St. Thomas, USVI

- Advised the Governor on all local and national health policy matters.
- Acted as a liaison to local government's Department of Health, Hospital Facilities Corporation, GESC/Health Insurance
 - Board Trustees, and FQHCs
- Acted as a liaison to CMS, HRSA, and HHS
- Represented the territory at numerous National Governors Association's Health Policy Advisors meetings and workshops
- Provided research on health policy related issues
- Attended board meetings of the hospitals and Health Insurance Board of Trustees
- Acted as Government House representative to local provider community

Education

Georgia Institute of Technology 46 Graduate Credits Polymer Science
University of the Virgin Islands BS, Chemistry with Physics



**Chip
Cantrell, cccm**
SENIOR CONSULTANT, HMA

Overview

- Expertise in project management, operations management, managed care, vendor management, system and program implementation, request for proposal development (RFP) development and procurement support, training development and delivery, curriculum design, customer service, and call center operations.
- Extensive experience as part of project management offices (PMOs) implementing systems and programs
- Expertise and experience with the Centers for Medicare & Medicaid Services (CMS) Outcomes Based Certification (OBC) processes for federally funded system implementations
- More than 19 years of project management and operations experience in support of Medicaid and Children's Health Insurance Plan (CHIP) populations

Professional Experience

Health Management Associates, Inc. | 2014 – present

As a part of the HMA team, contributes to various consulting and project management assignments including:

- Manages multiple client engagements, providing technical assistance and consultation, procurement support and proposal management, and specific scope of work management
- Assists multiple Medicaid managed care plans in preparing for state managed care procurements, including proposal scoring and red team reviews
- Performs as Deputy Project Manager for the South Dakota Eligibility & Enrollment system implementation.
- Provided project management support for the South Dakota prior authorization information system project, drafted the RFP, developed the evaluation plan, facilitated the proposal evaluations, and facilitated the vendor oral presentations and demonstrations
- As a part of the South Dakota eligibility and enrollment project, provided consulting services working on the Medicaid information technology architecture (MITA) assessment of the eligibility and enrollment business processes and technology, drafted functional requirements for review by state staff and assisted in the facilitation of functional requirements review sessions, and provides project management support of the RFP and evaluation process
- Provides project management and resource coordination of the HMA Medicaid Market Solutions Kentucky HEALTH 1115 waiver project; participated in joint application design and reviewed high-level requirement and detailed design documents for the community engagement program area as a part of the policy and requirements program integration management team
- Project management services to assist a health maintenance organization implement Medicaid managed care in the states of Delaware and Georgia
- Provided project management support for the South Dakota provider revalidation project, including the implementation of a project management framework and development of internal project team and external stakeholder communication plans
- Supported South Dakota Medicaid expansion planning by performing an operational impact assessment, including the development of process inventories, process maps, process disconnects, and process improvement opportunities
- Project management services to assist a federally qualified health center solicit, procure, and implement a modern, content and feature-rich Intranet
- Project management services to assist a private sector quality improvement organization implement their product and services in multiple states

Education

Fairleigh Dickinson University, Sociology

Clayton State College, Business Administration

Benchmark Portal College of Call Center Excellence, Call Center Management Certification

Scrum Alliance, Inc., Certified ScrumMaster®

Project Management Master's Certificate, Stevens Institute of Technology

3.2 Key Staff References

Table 14: Graciela Salcedo Reference Form

| Key Personnel Reference Form | | | | | |
|--|----------------------------|-----------------|---|-----------------|-------------------|
| Key Personnel Name: | Graciela Salcedo | | Proposed Role: | Account Manager | |
| Reference 1 | | | | | |
| Client Name: | PR Medicaid Program (PRMP) | Client Address: | 268 World Plaza, Suite 505 Ave. Muñoz Rivera Hato Rey, PR 00917 | | |
| Contact Name: | Luz (Nildy) Cruz | Contact Title: | Director of Operations | | |
| Contact Phone: | 787-765-2929 ext. 6732 | Contact Email: | Luz.cruz@salud.pr.gov | | |
| Project Name: Organization Change Management (OCM) | | | Start Date: | 03/2020 | End Date: 09/2021 |
| Project Description: OCM program to ensure PRMP employees and beneficiaries embrace the changes brought about by the new MEDITI3G system and processes being implemented. Conducted a diagnostic to understand key stakeholder's mindsets and behaviors towards proposed changes. Then, designed a structured change management program along with the coordination of all training and communication efforts related to the new system. | | | | | |
| Project Role and Responsibilities: As Engagement Director, I oversaw the successful execution of the project and all its work fronts. I managed the client relationship with key PRMP stakeholders. | | | | | |
| Reference 2 | | | | | |
| Client Name: | Triple-S Salud | Client Address: | P.O. Box 363628 San Juan, PR 00936-3628 | | |
| Contact Name: | Madeline Hernández-Urquiza | Contact Title: | Former President | | |
| Contact Phone: | 939-640-3444 | Contact Email: | Murquiza04@gmail.com | | |
| Project Name: Strategic PMO | | | Start Date: | 01/2017 | End Date: 12/2020 |
| Project Description: Establish a comprehensive PMO framework aligned with the existing Triple-S PMO structure to ensure the successful implementation of the Strategic Plan. | | | | | |
| Project Role and Responsibilities: As Engagement Director, I was the main contact for the Triple-S President, overseeing the PMO governance, facilitating monthly steering committee meetings, managing multiple stakeholders, delivering progress reports, and creating strategic presentations for the Board of Directors. | | | | | |

Table 15: Joaquín Rodríguez Reference Form

| Key Personnel Reference Form | | | |
|------------------------------|---------------------|-----------------|---|
| Key Personnel Name: | Joaquín Rodríguez | Proposed Role: | Lead Project Manager |
| Reference 1 | | | |
| Client Name: | Liberty Puerto Rico | Client Address: | 279 Ave. Juan Ponce de León San Juan, PR 00917 |

| | | | | | | |
|---|----------------------|-----------------|--|--------|-----------|-------------|
| Contact Name: | Esteban Luengo | Contact Title: | VP Transformation & PMO | | | |
| Contact Phone: | 787.657.3050 x4201 | Contact Email: | Esteban.luengo@libertypr.com | | | |
| Project Name: Liberty & ATT post-merger integration | | | Start Date: | 1/2021 | End Date: | In progress |
| Project Description: Program management of the post-merger integration of Liberty Puerto Rico and AT&T. | | | | | | |
| Project Role and Responsibilities: Engagement Manager responsible for managing the V2A team and client relationship as part of the Carve-out Integration Management Office (CIMO). Oversee key projects execution, manage functional team stakeholders, support CIMO in identifying and managing program risks, define internal communications strategies, and create and implement a program reporting tool. | | | | | | |
| Reference 2 | | | | | | |
| Client Name: | Medicare y Mucho Más | Client Address: | Torre Chardón 350 Ave. Chardón suite 600 San Juan, PR 00917 | | | |
| Contact Name: | Vilmarí García | Contact Title: | Chief Operating Officer | | | |
| Contact Phone: | (787) 622-3000 | Contact Email: | Vilmari.garcia@mmmhc.com | | | |
| Project Name: Bid submission and AEP readiness | | | Start Date: | 2/2008 | End Date: | 2/2009 |
| Project Description: Design and implement the MA product, sales, and retention lifecycle by translating strategic goals into actionable workplans and coordinating efforts across all departments | | | | | | |
| Project Role and Responsibilities: <ul style="list-style-type: none"> Plan and execute the product definition and on time submission project to regulator by coordinating cross-department workplan Design and implement a company-wide program to ensure operational preparedness for Annual and Open Enrollment Periods Manage daily war room operations in coordination with sales, retention, medical and network departments, managing all internal communications and tracking issues and resolution | | | | | | |

Table 16: Lorraine Martínez Reference Form

| Key Personnel Reference Form | | | | | |
|--|-------------------------|-----------------|--|---------|-------------------|
| Key Personnel Name: | Lorraine Martínez | Proposed Role: | Project Manager | | |
| Reference 1 | | | | | |
| Client Name: | Triple S - Salud | Client Address: | P.O. Box 363628 San Juan, PR 00936-3628 | | |
| Contact Name: | Ivelisse Cancel Fonseca | Contact Title: | Clinical Operations Vice-President | | |
| Contact Phone: | (787) 487 - 6096 | Contact Email: | ivelissec@ssspr.com | | |
| Project Name: Model of Care – Clinical Integrated Care Units | | | Start Date: | 01/2018 | End Date: 06/2019 |
| Project Description: Clinical Operations team was accountable to manage the SNP (Special Need Population), as part of their Medicare's MOC (Model of Care). Our project's scope included the conceptual design and | | | | | |

operationalization of the CICUs (Clinical Integrated Care Units), supporting Triple S satisfying a highly regulated minimum of requirements for the preventive care and treatment of this population.

Project Role and Responsibilities: Associate responsible for:

- Defining and leading the workplan for the CICUs design, pilot and implementation rollout.
- Coordinate and lead weekly meetings with stakeholders were held for initiatives monitoring and progress report.
- Identifying main challenges, provide visibility and agree on action plan with management team.

Reference 2

| | | | | | | |
|----------------------------------|--------------------------|-----------------|---|---------|-----------|-----------------------|
| Client Name: | Liberty Puerto Rico | Client Address: | 279 Ave. Juan Ponce de León San Juan, PR 00917 | | | |
| Contact Name: | Esteban Luego | Contact Title: | VP Transformation & PMO | | | |
| Contact Phone: | 787-657-3050 (x-4201) | Contact Email: | esteban.luengo@libertypr.com | | | |
| Project Name: FTTH Migrations | | | Start Date: | 08/2021 | End Date: | 03/2022 (expected) |

Project Description:

The objective is to define the end-to-end process that Liberty should follow to migrate ~150K customers from coaxial to fiber optic technology. All customers should be migrated in a term of 5 years. Project scope included the identification and prioritization of current process's pain points, a documented design of a new process validated with stakeholders and the installation of the project governance to guarantee a successful implementation.

Project Role and Responsibilities: Engagement Manager responsible for creating and managing the work plan of the engagement through its diagnostic and design stages. Agile SCRUM methodology was adopted so high-value-added deliverables were prioritized in a weekly basis. Project's management weekly routine included pending actions, team members workload evaluation and progress/challenges/risk report to Liberty's sponsor. As an internal team dynamic, initiatives' status was discussed in a daily basis.

Table 17: Geraldine Rodríguez Reference Form

| Key Personnel Reference Form | | | | | | |
|--|---|-----------------|--|---------|-----------|---------|
| Key Personnel Name: | Geraldine Rodríguez | Proposed Role: | Project Manager | | | |
| Reference 1 | | | | | | |
| Client Name: | ASTHO Association of State and Territorial Health Officials | Client Address: | 600 Peachtree Street NE, Suite 1000, Atlanta, GA 30308 | | | |
| Contact Name: | Neyling Fajardo | Contact Title: | Director Territorial Support | | | |
| Contact Phone: | 571-527-3156 | Contact Email: | nfajardo@astho.org | | | |
| Project Name: Grant Management Optimization Toolkit | | | Start Date: | 02/2021 | End Date: | 06/2021 |
| Project Description: Develop a Grants Optimization Toolkit that includes a set of electronic tools designed to conduct a self-assessment, recommend the best structure to manage grants and allocate those efforts across funded PRDOH Programs. | | | | | | |

| | | | | | |
|---|----------------|-----------------|---------------------------------------|---------|-------------------|
| Project Role and Responsibilities: Engagement Manager responsible for day-to-day progress and project planning, managing interviews agenda, and serving as main contact between ASTHO and V2A team. Collect information and develop analysis supporting recommendations. | | | | | |
| Reference 2 | | | | | |
| Client Name: | Triple S | Client Address: | 101 Av. San Patricio, Guaynabo, 00969 | | |
| Contact Name: | Griselle Bigio | Contact Title: | Strategic Director | | |
| Contact Phone: | (787) 429-0818 | Contact Email: | griselle.bigio1@ssspr.com | | |
| Project Name: Strategic Portfolio Project Management Support | | | Start Date: | 02/2017 | End Date: 10/2018 |
| Project Description: Identify operational and strategic projects needed as part of establishing and executing a PMO at Triple S for all business lines. | | | | | |
| Project Role and Responsibilities: Associate <ul style="list-style-type: none"> Monitored progress and provided visibility to company executives of the strategic project portfolio. Lead multi-area/integrated workshops to enable the necessary brainstorming for new initiatives to be developed. Supported business areas in developing budget needs for the strategic initiatives and developed success measures and objectives to demonstrate the impact of the planned initiatives. | | | | | |

Table 18: Malu Blázquez Reference Form

| | | | | | |
|---|--|-----------------|--|---------|-------------------|
| Key Personnel Reference Form | | | | | |
| Key Personnel Name: | María de L. (Malu) Blázquez | Proposed Role: | PM Subject Matter Expert | | |
| Reference 1 | | | | | |
| Client Name: | Center for the New Economy, Inc. (CNE) | Client Address: | 206 Calle Tetuán San Juan, PR 00901 | | |
| Contact Name: | Mike Soto | Contact Title: | President | | |
| Contact Phone: | 787-622-1120 | Contact Email: | mike@grupocne.org | | |
| Project Name: Relmagina Puerto Rico | | | Start Date: | 01/2018 | End Date: 07/2020 |
| Project Description: The Relmagina Puerto Rico non-profit initiative developed and published 97 actionable recommendations & 4 guiding principles for how to use post-Hurricane Maria recovery funds to help rebuild Puerto Rico in a way that makes the Island stronger and better prepared for future challenges. Provided leadership and support in key reforms and collaborative initiatives that foster resiliency and sustainability in key infrastructure sectors for the long-term reconstruction of Puerto Rico, specifically in the Energy, Housing and Water sectors; and fostering investments and best practices that maximize equity, inclusiveness, collaboration, transparency, and social well-being in the recovery implementation. | | | | | |
| Project Role and Responsibilities: Program/Project Manager responsible for implementing initiative: <ul style="list-style-type: none"> Development and execution of initiative from start to finish by developing strategy, vision, and execution plans. Coordinated, executed, and monitored planned activities. Managed administration of the program, contracting and supervising staff and other resources, and managing and controlling budget. | | | | | |

- Managed public outreach and stakeholder engagement, which included participation in 77 meetings/activities and interaction with 750 persons for the development of needs, goals, and recommendations.
- Managed the production, translation, and quality review of the publication of 7 reports in Spanish & English that address sectors of high relevance for the reconstruction of Puerto Rico within a very limited timeframe.
- Interacting and reporting to client (CNE and 3 philanthropic organizations who provided program funding) on program activities and milestones, and outcomes and results.
- Established collaborations with 8+ NGOs to promote and/or implement reconstruction recommendations; and co-developed with other NGOs a Guide for Hurricane Resistant Homes on the Island and a Guide for Resilient Community Center Design in Island Communities.
- Directed the design, development, and implementation of two platforms created to support the reconstruction of Puerto Rico: resurgepr.org, and construccionpr.org.

Reference 2

| | | | | | | |
|--|--|-----------------|--|--------|-----------|---------|
| Client Name: | Department of Economic Development and Commerce (DEDC) | Client Address: | 355 FD Roosevelt Ave San Juan, Puerto Rico 00918 | | | |
| Contact Name: | Carlos Amy (DDEC)/ Luis J. Rivera (CSA) | Contact Title: | Special Assistant to Secretary of Economic Development and Commerce/ CSA Program Manager | | | |
| Contact Phone: | 917-662-8461 LJR | Contact Email: | Ljrivera@csagroup.com | | | |
| Project Name: Design and Development Plans of San Juan Waterfront Development (Bahía Urbana) | | | Start Date: | 8/2006 | End Date: | 12/2013 |
| Project Description: Design and Development Plans for the San Juan Waterfront Development (Bahía Urbana) of 100 acres of land in Puerta de Tierra. Responsible for managing client and CSA Group resources and subconsultants in performing overall project management of the following services: environmental permitting and planning documents, and obtaining all necessary permits and endorsements; secondary studies related to this permitting process, comprehensive surveying work; architectural and engineering design work; development and management of contractor procurement services; and construction observation work. | | | | | | |
| Project Role and Responsibilities: Project Manager for the San Juan Waterfront Development (Bahía Urbana) Design and Development team, including: <ul style="list-style-type: none"> • Responsible for managing the CSA project team (and subconsultants) for two different clients/government administrations by leading project planning and coordination of activities and managing resources, project schedule/plans and deliverables. • Managed the successful completion and government approval of the Master Plan, Environmental Impact Statement, and Design for the San Juan Waterfront Project (Bahía Urbana) comprised of 100 acres. • Managed project design construction observation of the completed construction of the Bahía Urbana projects: Pier 6, Pier 7 & 8 and Eastern Gateway projects in Puerta de Tierra. • Performed budget management and invoicing. • Performed project reporting to client and CSA Group and other relevant stakeholders. • Designed and executed stakeholder engagement plans with community members affected by the development plans. • Managed construction observation work and strategized with impacted parties on resolving construction design conflicts and issues. | | | | | | |

Table 19: Margarita Gregorio Reference Form

| Key Personnel Reference Form | | | | | |
|---|---|-----------------|---|-----------|---------|
| Key Personnel Name: | Margarita Gregorio | Proposed Role: | Communications Management Lead | | |
| Reference 1 | | | | | |
| Client Name: | PR Medicaid Program (PRMP) | Client Address: | 268 World Plaza, Suite 505 Ave. Muñoz Rivera Hato Rey, PR 00917 | | |
| Contact Name: | Luz (Nildy) Cruz | Contact Title: | Director of Operations | | |
| Contact Phone: | 787-765-2929 ext. 6732 | Contact Email: | Luz.cruz@salud.pr.gov | | |
| Project Name: | Organization Change Management (OCM) | Start Date: | 03/2020 | End Date: | 09/2021 |
| <p>Project Description: OCM program to ensure PRMP employees and beneficiaries embrace the changes brought about by the new MEDITI3G system and processes being implemented. Conducted a diagnostic to understand key stakeholder's mindsets and behaviors towards proposed changes. Then, designed a structured change management program along with the coordination of all training and communication efforts related to the new system.</p> | | | | | |
| <p>Project Role and Responsibilities: Subject Matter Expert in Communications, responsible for developing and executing all communications regarding the new MEDITI3G, including:</p> <ul style="list-style-type: none"> • Design and execute Communications Plan • Design and distribute all Internal Communication regarding MEDITI3G, such as: <ul style="list-style-type: none"> ○ Flyers, Posters and Direct Mail ○ Emails ○ Videos and Scripts ○ Playbook ○ Training Invitations ○ Daily information • Daily interaction with client and vendors to ensure important communications were being delivered within the organization. | | | | | |
| Reference 2 | | | | | |
| Client Name: | 41 Ideas, LLC | Client Address: | 1352 Luis Vigoreaux Ave. #446 Guaynabo, PR 00966 | | |
| Contact Name: | Marileana Soto | Contact Title: | Founder and President of 41 Ideas | | |
| Contact Phone: | 787-930-5151 | Contact Email: | marileana@41ideas.com | | |
| Project Name: | Primavera Glade CEAL (Consejo Empresarial de Americal Latina) | Start Date: | 05/2019 | End Date: | 08/2021 |
| <p>Project Description:</p> <ul style="list-style-type: none"> • Develop marketing and Communications Campaign for Glade Spring product launch • Execute, coordinate and supervise promotional activities for Glade • Coordinate vendors, suppliers and schedules for Public Relations events for CEAL annual Convention • Design and coordinate Media kits | | | | | |

Project Role and Responsibilities: Account Executive responsible for managing relations with clients, vendors and execution of campaign and events.

- Account Management: Planning, execution, and coordination
- Budget management

Table 20: Carmen Denton Reference Form

| Key Personnel Reference Form | | | | | |
|--|--|-----------------|---|-----------|----------|
| Key Personnel Name: | Carmen Denton | Proposed Role: | Business Lead | | |
| Reference 1 | | | | | |
| Client Name: | PR Medicaid Program (PRMP) | Client Address: | 268 World Plaza, Suite 505 Ave. Muñoz Rivera Hato Rey, PR 00917 | | |
| Contact Name: | Luz (Nildy) Cruz | Contact Title: | Director of Operations | | |
| Contact Phone: | 787-765-2929 ext. 6732 | Contact Email: | Luz.cruz@salud.pr.gov | | |
| Project Name: Organization Change Management (OCM) | | Start Date: | 03/2020 | End Date: | 09/2021 |
| Project Description: OCM program to ensure PRMP employees and beneficiaries embrace the changes brought about by the new MEDITI3G system and processes being implemented. Conducted a diagnostic to understand key stakeholder's mindsets and behaviors towards proposed changes. Then, designed a structured change management program along with the coordination of all training and communication efforts related to the new system. | | | | | |
| Project Role and Responsibilities: Training Lead Position | | | | | |
| Responsibilities: | | | | | |
| <ul style="list-style-type: none"> • Day to day progress and project planning related to the coordination and technical training plan. • Review and provide input on Technical Training Plan and materials. • Facilitate coordination of training schedule and manage evaluation process. • Provide recommendations to training plan. • Support to technical training planning team. • Submission of monthly report of accomplishments on execution of training plan activities. | | | | | |
| Reference 2 | | | | | |
| Client Name: | ABRE PR (Centro de Investigación y Política Pública) | Client Address: | 1500 C/ Antonsanti, Suite K-Colaboratorio San Juan, P.R. 00907 | | |
| Contact Name: | Vanesa Torres | Contact Title: | Director of Operations at ABRE PR | | |
| Contact Phone: | 787-605-1870 | Contact Email: | vanesa@abrepr.org | | |
| Project Name: Evaluation of School Performance- A Case Study Report | | Start Date: | 02/2020 | End Date: | 11/ 2020 |
| Project Description: Completion of five (5) case study reports, to detect enabling factors for academic performance, in instances where schools with similar student profile and geographic proximity have different academic outcomes; lessons learned and recommendations for improving academic outcomes were included in the final report. A hybrid method of evaluation, (applying quantitative and qualitative approaches) was used. | | | | | |

Project Role and Responsibilities: The Project Director is responsible for the overall execution of the fieldwork surrounding Evaluation of School Performance: A Case Study Report initiative. The Project Director works directly with the ABRE Executive Director to develop the project schedule, define the research instruments, develop an analysis plan, and coordinate all communications with project stakeholders (schools, principals, PRDOE).

Responsibilities:

- Provide leadership to the ABRE Project, including recruitment of volunteers; developing relationships with selected schools, including teachers and parents, and PRDOE staff; ensuring a favorable image of ABRE project through targeted outreach and engagement.
- Develop and manage project schedules and budget
- Manage the collecting and compilation of statistical information at the schools and PRDOE
- Schedule and coordinate internal and external resources
- Develop comprehensive project plans shared with ABRE executive director and other team members.
- Make oral presentations to school community members, students, parents, counselors, and professional colleagues at various gatherings regarding the project.

Table 21: Paul Cohen Reference Form

| Key Personnel Reference Form | | | | | |
|---|--|-----------------|---|-----------|---------|
| Key Personnel Name: | Paul Cohen | Proposed Role: | PRMP Subject Matter Expert | | |
| Reference 1 | | | | | |
| Client Name: | PR Medicaid Program (PRMP) | Client Address: | 268 World Plaza, Suite 505 Ave. Muñoz Rivera Hato Rey, PR 00917 | | |
| Contact Name: | Luz (Nildy) Cruz | Contact Title: | Director of Operations | | |
| Contact Phone: | 787-765-2929 ext. 6732 | Contact Email: | Luz.cruz@salud.pr.gov | | |
| Project Name: Organization Change Management (OCM) | | Start Date: | 03/2020 | End Date: | 09/2021 |
| Project Description: OCM program to ensure PRMP employees and beneficiaries embrace the changes brought about by the new MEDITI3G system and processes being implemented. Conducted a diagnostic to understand key stakeholder's mindsets and behaviors towards proposed changes. Then, designed a structured change management program along with the coordination of all training and communication efforts related to the new system. | | | | | |
| Project Role and Responsibilities: Engagement Manager responsible for managing the V2A team and the day-to-day execution of the engagement, including: <ul style="list-style-type: none"> • Internal project planning and integration with master plan • Coordinating, executing, and following up on planned activities • Managing (time and quality) committed and additional deliverables • Interacting with client and vendors' key stakeholders for general coordination, share information and findings, identify, and mitigate risk and issues | | | | | |
| Reference 2 | | | | | |
| Client Name: | Department of Economic Development and Commerce (DEDC) | Client Address: | 355 FD Roosevelt Ave San Juan, Puerto Rico 00918 | | |

| | | | | | | |
|--|----------------|----------------|---|---------|-----------|---------|
| Contact Name: | Manuel Laboy | Contact Title: | Former Secretary of Economic Development and Commerce | | | |
| Contact Phone: | 1-800-685-6022 | Contact Email: | mlaboy@cor3.pr.gov | | | |
| Project Name: DEDC's Reorganization Implementation Support | | | Start Date: | 11/2017 | End Date: | 03/2020 |
| Project Description: <ul style="list-style-type: none"> Diagnostic – fact-based evaluation of programs and functions of the DEDC umbrella including both front-end and back-end functions. Identification of “no-regrets” organizational initiatives for quick implementation Design New DEDC Organization – ensuring full alignment with the Administration’s strategic vision and design principles. As a final end-product of this phase includes the design of the new DEDC’s organization structure at a both macro and detailed level Implementation (PM) – Support the implementation of consolidation initiatives, including integrating back-office functions, services contracts consolidation, optimization of physical spaces, savings tracking and reporting. | | | | | | |
| Project Role and Responsibilities: Engagement Manager responsible for managing the V2A team and the day-to-day execution of the engagement, including: <ul style="list-style-type: none"> Project Management: planning, coordination, execution Budget management Internal reporting: Secretary, deputies, and vendors External reporting support: Governor, FAFAA and FOMB Managing (time and quality) committed and additional deliverables | | | | | | |

Table 22: Marlene de Varona Reference Form

| Key Personnel Reference Form | | | | | | | |
|--|--|----------------------------|--|-----------------|---------|--|---------|
| Key Personnel Name: | | Marlene de Varona | | Proposed Role: | | PMO Subject Matter Expert | |
| Reference 1 | | | | | | | |
| Client Name: | | PR Medicaid Program (PRMP) | | Client Address: | | 268 World Plaza, Suite 505 Ave. Muñoz Rivera Hato Rey, PR 00917 | |
| Contact Name: | | Luz (Nildy) Cruz | | Contact Title: | | Director of Operations | |
| Contact Phone: | | 787-765-2929 ext. 6732 | | Contact Email: | | Luz.cruz@salud.pr.gov | |
| Project Name: Organization Change Management (OCM) | | | | Start Date: | 03/2020 | End Date: | 09/2021 |
| Project Description: OCM program to ensure PRMP employees and beneficiaries embrace the changes brought about by the new MEDITI3G system and processes being implemented. Conducted a diagnostic to understand key stakeholder’s mindsets and behaviors towards proposed changes. Then, designed a structured change management program along with the coordination of all training and communication efforts related to the new system. | | | | | | | |
| Project Role and Responsibilities: Subject Matter Expert responsible for supporting the V2A team in the use of change management, people development, and improvement methodologies and in the design and execution of the engagement, including: | | | | | | | |

- Designing tools to be used throughout the engagement for diagnostics, design, training, measures, deployment, and project management
- Designing and facilitating workshops, brainstorming, focus groups, and mindsets and behaviors trainings
- Designing survey and analyzing results
- Designing and running the pilot
- Interacting with client and vendors' key stakeholders for sharing information and findings, identifying, and mitigating risk and issues and/or opportunities

Reference 2

| | | | | | | |
|--|-----------------------------------|-----------------|--|------|-----------|---------|
| Client Name: | Pfizer Barceloneta API Operations | Client Address: | Carr 2 KN 58.2, Barceloneta, Puerto Rico, 00617 | | | |
| Contact Name: | Waleska Rodriguez | Contact Title: | Engineering Leader | | | |
| Contact Phone: | 787-385-5183 | Contact Email: | Waleska.rodriguezrivera@viatris.com | | | |
| Project Name: Pfizer Barceloneta Active Pharmaceutical Ingredients (API) Project Management Office (PMO) | | | Start Date: | 2010 | End Date: | 04/2013 |

Project Description:

- Full transformation of the API operation including the creation of the operational excellence team responsible for creating and running a local API PMO that would oversee the transformation.
- Designed a project management office (PMO) in charge of overseeing all improvement initiatives run by API engineers, scientists, managers and personnel.
- Generated a portfolio of projects, a project tracker and structured recurrent meetings to follow-up all projects, report status to overall site PMO and network, and have a healthy pipeline of projects to improve and transform operations.
- Conducted an overall API site transformational diagnostic including processes, management infrastructure, and mindsets and behaviors, designed a transformational roadmap, oversaw the roadmap, and lead, co-led, or coached mini transformations and projects included in the roadmap.
- Supervised team of LEAN green and black belt candidates as well as trainers that would manage and/or lead several of the initiatives included in the transformational roadmap and PMO.

Project Role and Responsibilities: Project Leader under Technical Development API team responsible for operational excellence team including:

- Project Management: planning, coordination, execution
- Project Portfolio Management: overseeing a pipeline of projects
- Budget management including supporting new product cost structures for API on a yearly basis
- Managing (time and quality) committed and additional deliverables of each project
- Conduct training
- Conduct diagnostics
- Create Transformation Roadmaps and oversee them
- Execute the role of Transformation Expert, Lean Six Sigma Master Black Belt, Human Error Reduction Expert, People Development Expert
- Lead Six Sigma Projects and Transformations
- Coach Six Sigma Projects and Transformations performed by others
- Lead the training team for API

Table 23: Juan Montañez Reference Form

| Key Personnel Reference Form | | | | | |
|---|--|-----------------|---|-----------|---------|
| Key Personnel Name: | Juan Montañez | Proposed Role: | HMA Account Manager | | |
| Reference 1 | | | | | |
| Client Name: | Fairfax County Health Department | Client Address: | 10777 Main Street Fairfax, VA 22030 | | |
| Contact Name: | Jessica Werder | Contact Title: | Deputy Director, Public Health Operations | | |
| Contact Phone: | 703-246-8467 | Contact Email: | jessica.werder@fairfaxcounty.gov | | |
| Project Name: Health and Human Services System Information Technology Strategic Plan and Roadmap | | Start Date: | 07/2015 | End Date: | 06/2018 |
| Project Description: Develop and implement a strategic plan and roadmap for modernizing information systems across eight agencies to enable effective collaboration and improved access to information across programs. | | | | | |
| Project Role and Responsibilities: HMA project manager, IT governance board facilitator, lead architect | | | | | |
| Reference 2 | | | | | |
| Client Name: | Puerto Rico Department of Health – Transformation Office | Client Address: | Puerto Rico Department of Health Headquarters, San Juan, Puerto Rico GPO Box 70184, San Juan, PR 00936 | | |
| Contact Name: | Fred Gordo Gonzalez | Contact Title: | Health Insurance Exchange Project Manager (former role) | | |
| Contact Phone: | (787) 421-2776 | Contact Email: | fgordogon@gmail.com | | |
| Project Name: Health Insurance Exchange Feasibility Analysis | | Start Date: | 11/2011 | End Date: | 04/2012 |
| Project Description: Assess the feasibility of establishing a health insurance exchange in Puerto Rico. | | | | | |
| Project Role and Responsibilities: HMA team manager | | | | | |
| Reference 3 | | | | | |
| Client Name: | South Dakota Department of Social Services | Client Address: | 700 Governors Drive Pierre, SD 57501 | | |
| Contact Name: | Brenda Tidball-Zeltinger | Contact Title: | Deputy Secretary | | |
| Contact Phone: | 605-773-3165 | Contact Email: | brenda.tidball-zeltinger@state.sd.us | | |
| Project Name: MMIS Go-Forward Plan Development | | Start Date: | 05/2015 | End Date: | 11/2015 |
| Project Description: Develop a plan for replacing the legacy MMIS with state-of-the-art, interoperable “modules” | | | | | |
| Project Role and Responsibilities: HMA team manager and lead architect | | | | | |

Table 24: Wade Miller Reference Form

| Key Personnel Reference Form | | | |
|------------------------------|--|-----------------|--|
| Key Personnel Name: | Wade Miller | Proposed Role: | Integration Management Lead |
| Reference 1 | | | |
| Client Name: | South Dakota Department of Social Services | Client Address: | 700 Governors Drive Pierre, SD 57501 |
| Contact Name: | Carrie Johnson | Contact Title: | Division Director, Division of Economic Assistance |
| Contact Phone: | 605-773-5228 | Contact Email: | carrie.johnson@state.sd.us |

| | | | | | |
|--|--|-----------------|--|-----------|------------|
| Project Name: PM Eligibility Enrollment | | Start Date: | 01/04/2016 | End Date: | 05/31/2019 |
| Project Description: provided the South Dakota Department of Social Services, Division of Economic Assistance, project management and consulting services to enable the State to continue meeting ACA requirements and assist the State in procuring and implementing a new Integrated Eligibility and Enrollment System. The new system will include eligibility determinations and ongoing case maintenance for :Medicaid, CHIP, SNAP, TANF, Child Care and LIEAP. | | | | | |
| Project Role and Responsibilities: Overall project manager, liaison with the State of South Dakota DSS | | | | | |
| Reference 2 | | | | | |
| Client Name: | South Dakota Department of Social Services | Client Address: | 700 Governors Drive Pierre, SD 57501 | | |
| Contact Name: | Mark Close | Contact Title: | Information Systems Coordinator, Division of Medical Services | | |
| Contact Phone: | 605-773-3495 | Contact Email: | mark.close@state.sd.us | | |
| Project Name: MMIS Roadmap | | Start Date: | 05/21/2015 | End Date: | 06/30/2015 |
| Project Description: provided experts in enterprise information technology architecture, the Medicaid Information Technology Architecture (MITA), IT project planning and management and Medicaid program design to discuss options\alternatives for acquiring and implementing services\components to modernize the State's MMIS. | | | | | |
| Project Role and Responsibilities: Provided integration expertise | | | | | |

Table 25: Alex Grodner Reference Form

| Key Personnel Reference Form | | | | | |
|---|--|--------------------------------------|--|-------------------------------------|---------|
| Key Personnel Name: | | Alex Grodner | | Proposed Role: | |
| | | | | Testing Management Lead | |
| Reference 1 | | | | | |
| Client Name: | | Louisiana Department of Health (LDH) | | Client Address: | |
| | | | | 628 N 4th St, Baton Rouge, LA 70802 | |
| Contact Name: | | Theresa Carter | | Contact Title: | |
| | | | | LaMEDS (E&E) Product Manager | |
| Contact Phone: | | 318-393-7065 | | Contact Email: | |
| | | | | Theresa.Carter@la.gov | |
| Project Name: Project & Portfolio Management Office (PPMO) | | | | Start Date: | 06/2019 |
| | | | | End Date: | Present |
| Project Description: Provide Project & Portfolio Management Office services for its technical and business projects. LDH anticipates up to four MMIS modernization module projects active at any one time and fifteen (15) to twenty-five (25) small/medium projects per year. The PPMO will provide: | | | | | |
| <ul style="list-style-type: none">Project management for various technical and business projects involving multiple vendors and cross-functional, internal teams.Program management for the MMIS Modernization Program to meet CMS requirements.Portfolio management for the agency’s projects and programs, including demand management & portfolio analytics. | | | | | |
| Project Role and Responsibilities: | | | | | |
| As the Testing Lead for the entire portfolio of projects under LDH’s purview, I have planned many roles during my time on the project. Those roles include: | | | | | |
| <ul style="list-style-type: none">Led the Test Management, including leading UAT for the Provider Management moduleProject Manager over the successful implementation of the Asset Verification System (AVS)Acted as the UAT Onboarding Lead & Senior Business Analyst (BA) for the Louisiana Medicaid Eligibility Determination System (LaMEDS) | | | | | |

| | | | | | |
|---|--|-----------------|--|-----------|---------|
| <ul style="list-style-type: none"> ○ In my role as UAT Onboarding Lead, I lead the creation of a full onboarding plan & material creation for 25 new User Acceptance Testers who had never used the system or tested before in 2 weeks; I led the delivery of the training over 4 days ○ As a Senior BA, I built out an As-Is process flow and suggested a To-Be process flow across six (6) work streams for the full DDI process of LaMEDS ● Currently building out a full end-to-end MES modular & repeatable process for test oversight and execution for the agency | | | | | |
| Reference 2 | | | | | |
| Client Name: | North Carolina Department of Health and Human Services (NC DHHS) | Client Address: | 79 T.W. Alexander Drive Research Triangle Park, NC 27709 | | |
| Contact Name: | Diana Vasquez-Castillo | Contact Title: | State Test Lead | | |
| Contact Phone: | 703-625-5040 | Contact Email: | Diana.Vazquez@dhhs.nc.gov | | |
| Project Name: North Carolina Families Accessing Services through Technology (NC FAST) | | Start Date: | 03/2012 | End Date: | 08/2016 |
| <p>Project Description: DHHS has undertaken a significant information systems modernization effort, known as the North Carolina Families Accessing Services through Technology (NC FAST) Program.</p> <p>The NC FAST Program is designed to improve the way DHHS and the 100 county departments of social services provide benefits and services to the people of North Carolina. Process improvements provided by NC FAST will allow staff to spend less time performing cumbersome administrative tasks and instead focus more of their time on assisting families.</p> <p>To support the NC FAST Program, DHHS has engaged a team with experience in large, complex systems integration projects and the Cúram platform to provide a variety of periodic, on-site services.</p> <p>Project Role and Responsibilities: Throughout my time on NC FAST, I took on almost every major role in the DDI process.</p> <ul style="list-style-type: none"> ● Started on the project as a Testing Analyst where I developed over 350 System Integration test scripts for the Medicaid (traditional and MAGI) implementation. I also identified and retested over 120 defects during that time, while becoming the go-to person for onboarding new testers to the project. ● Led a team of 10 trainers and 56 On-Site Support members on processing over 40,000 Affordable Care Act Account Transfer Applications. ● Led a team of 8 testers for production testing of over 200 test scripts for the State Data Exchange (SDX) batch interface. NC used the SDX batch to create low-touch/no-touch active ABD cases, this affected their 250,000 annual SSI recipients. ● Led a team of 11 on the Operations & Maintenance team to resolve Tier 3 Help Desk tickets. Additionally, was the SME for all interface issues with ancillary systems, including with the MMIS system. | | | | | |
| Reference 3 | | | | | |
| Client Name: | Mississippi Division of Medicaid (DOM) | Client Address: | 550 High Street, Suite 1000 Jackson, Mississippi 39201 | | |
| Contact Name: | Karla Smolen | Contact Title: | Project Manager | | |
| Contact Phone: | (404) 729-1378 | Contact Email: | Karla@smolen.me | | |
| Project Name: Health & Human Services Transformation Project (HHSTP) | | Start Date: | 01/2019 | End Date: | 06/2019 |
| <p>Project Description: As a result of the planning effort, DOM and MDHS jointly launched the HHS Transformation Project or “HHSTP” which is dedicated to accomplishing the goals of the Medicaid and Human Services Transparency and Fraud Prevention Act and submitting the Advanced Planning Document. DOM and MDHS prioritized quick wins and collaboration to prove success and planned for scalable future success.</p> | | | | | |

In Tier One of HHSTP, DOM and MDHS plan to implement three major modules that form the foundation: 1) Common Web Portal Module 2) Fraud and Abuse Module and 3) Data Hub Module.

Project Role and Responsibilities:

During my time on the HHSTP project, I assisted on the implementation of the first module, the Common Web Portal (CWP). My role consisted of acting as a testing & eligibility SME to provide various process improvement opportunities for the project. This included:

- Executing end-to-end test scripts
- General process improvement on reporting on test execution results, requirements traceability, and key decisions made by the various stakeholders
- Short-term (manual) and long-term (automated) plan for reporting system transactions that passed through the system's ESB to each of the eligibility systems (Medicaid and SNAP/TANF)

Table 26: Luis Sylvester Reference Form

| Key Personnel Reference Form | | | | | |
|---|--|--|-----------------|---|-------------------|
| Key Personnel Name: | Luis Sylvester | | Proposed Role: | Quality Management Lead | |
| Reference 1 | | | | | |
| Client Name: | Molina Medicaid Solutions in West Virginia | | Client Address: | 2303 Circle Drive Morgantown, WV 26505 | |
| Contact Name: | Dr. Ruth Ann Panepinto | | Contact Title: | Former Executive Account Manager for West Virginia's Molina Medicaid Solution | |
| Contact Phone: | (304) 282-4390 | | Contact Email: | Rapanepinto@comcast.net | |
| Project Name: United States Virgin Islands Medicaid Management Information Systems (MMIS) Project | | | Start Date: | 10/2012 | End Date: 12/2019 |
| Project Description: This project represented the first partnership between The State of West Virginia and the Territory of the United States Virgin Islands to allow the territory to share West Virginia's MMIS Platform. | | | | | |
| Project Role and Responsibilities: In my role as the Project Director, I oversaw the implementation of this project from the kickoff to the execution of the Detailed Design and Implementation (DDI), the System Integration Testing (SIT), User Acceptance Testing (UAT), and eventually to the Go-live operations. I transitioned to the Executive Account Manager where I oversaw the administration of the contract for seven years. | | | | | |
| Reference 2 | | | | | |
| Client Name: | U.S.V.I. Department of Human Services | | Client Address: | 1303 Hospital Ground Knud Hansen Complex Building A St. Thomas, U.S. Virgin Islands 00802 | |
| Contact Name: | Christopher Finch | | Contact Title: | Former Commissioner of the Department of Human Services | |
| Contact Phone: | (340) 690-8169 | | Contact Email: | Chris_finch@yahoo.com | |
| Project Name: United States Virgin Islands Medicaid Management Information Systems (MMIS) Project | | | Start Date: | 10/2012 | End Date: 12/2019 |
| Project Description: This project represented the first partnership between The State of West Virginia and the Territory of the United States Virgin Islands to allow the territory to share West Virginia's MMIS Platform. | | | | | |
| Project Role and Responsibilities: In my role as the Project Director, I oversaw the implementation of this project from the kickoff to the execution of the Detailed Design and Implementation (DDI), the System Integration Testing (SIT), User Acceptance Testing (UAT), and eventually to the Go-live operations. I transitioned to the Executive Account Manager where I oversaw the administration of the contract for seven years. | | | | | |

Table 27: Chip Cantrell Reference Form

| Key Personnel Reference Form | | | | | |
|--|---|-----------------|---|-------------------------------|---------|
| Key Personnel Name: | Chip Cantrell | | Proposed Role: | Certification Management Lead | |
| Reference 1 | | | | | |
| Client Name: | South Dakota Department of Social Services | Client Address: | 700 Governors Drive Pierre, SD 57501 | | |
| Contact Name: | Carrie Johnson | Contact Title: | Division Director, Division of Economic Assistance | | |
| Contact Phone: | 605-773-5228 | Contact Email: | carrie.johnson@state.sd.us | | |
| Project Name: South Dakota Eligibility & Enrollment System Implementation | | Start Date: | 08/2020 | End Date: | 02/2023 |
| Project Description: Initiative to replace a 35-year-old eligibility system with an automated, ACA and CMS Conditions & Standards, Conditions for Enhanced Funding compliant eligibility and enrollment system. | | | | | |
| Project Role and Responsibilities: Serves as Deputy Project Manager supporting all project management functions including, deliverable management, risk management, schedule management, organizational change management, and system certification. | | | | | |
| Reference 2 | | | | | |
| Client Name: | South Dakota Department of Social Services | Client Address: | 700 Governors Drive Pierre, SD 57501 | | |
| Contact Name: | Sam Masten | Contact Title: | Medicaid Eligibility Program Administrator, Economic Assistance | | |
| Contact Phone: | 605-295-3427 | Contact Email: | sam.masten@state.sd.us | | |
| Project Name: South Dakota Eligibility & Enrollment System Implementation | | Start Date: | 08/2020 | End Date: | 02/2023 |
| Project Description: Initiative to replace a 35-year-old eligibility system with an automated, ACA and CMS Conditions & Standards, Conditions for Enhanced Funding compliant eligibility and enrollment system. | | | | | |
| Project Role and Responsibilities: Serves as Deputy Project Manager supporting all project management functions including, deliverable management, risk management, schedule management, organizational change management, and system certification. | | | | | |
| Reference 3 | | | | | |
| Client Name: | South Dakota Department of Social Services, DSS IT Roadmap Office | Client Address: | 700 Governors Drive Pierre, SD 57501 | | |
| Contact Name: | Chris Hill | Contact Title: | Program Director | | |
| Contact Phone: | 402-651-2641 | Contact Email: | chris.hill@state.sd.us | | |
| Project Name: South Dakota Eligibility & Enrollment System Implementation | | Start Date: | 08/2020 | End Date: | 02/2023 |
| Project Description: Initiative to replace a 35-year-old eligibility system with an automated, ACA and CMS Conditions & Standards, Conditions for Enhanced Funding compliant eligibility and enrollment system. | | | | | |
| Project Role and Responsibilities: Serves as Deputy Project Manager supporting all project management functions including, deliverable management, risk management, schedule management, organizational change management, and system certification. | | | | | |

Attachment E: Mandatory Requirements

1. The vendor must provide the right of access to systems, facilities, data, and documentation to PRMP or its designee to conduct audits and inspections as is necessary.


2. The vendor must support PRMP's requests for information in response to activities including, but not limited to:
 - a. Compliance audits
 - b. Investigations
 - c. Legislative requests
3. The vendor must provide authorization from a parent, affiliate, or subsidiary organization for the PRMP to have access to its records if such a relationship exists that impacts the vendor's performance under the proposed contract.
4. The vendor must agree to comply with current and future PRMP and federal regulations as is necessary to support this RFO.
5. The vendor must help ensure that all applications inclusive of internet, intranet, and extranet applications associated with this contract are compliant with Section 508 of the Rehabilitation Act of 1973, as amended by 29 United States Code (U.S.C.) §794d, and 36 Code of Federal Regulation (CFR) 1194.21 and 36 CFR 1194.22.
6. The vendor must perform according to approved SLAs and identified KPIs with associated metrics in the areas listed in Appendix 2: Service-Level Agreements and Performance Standards.
7. The vendor must initially submit and then update deliverables as is detailed within the RFO, as is necessary for project success, and at the request of PRMP.
8. The vendor must submit updated deliverables for PRMP's approval based on the Project Schedule and Work Plan.
9. The vendor must provide a drug-free workplace, and individuals must not engage in the unlawful manufacture, distribution, dispensation, possession, abuse, or use of a controlled substance in the performance of the contract. (Drug-Free Workplace Act of 1988)
10. The vendor must comply with federal Executive Order 11246 related to Equal Employment Opportunity Act, the Clean Air Act, and the Clean Water Act.
11. The vendor must perform all work associated with this contract within the continental United States (U.S.) or U.S. Territories.
12. The vendor must serve as a trusted partner to PRMP and represent PRMP's interests in all activities performed under the resulting contract.
13. The vendor must serve as a trusted partner to MES Vendors in alignment with the requirements set forth in this RFO.
14. The vendor must, at a minimum, include the standard invoice package contents for PRMP, including, but not limited to:
 - a. An authorized representative of the contracted party must sign an itemized description of services rendered for the invoice period. Additionally, the vendor must include a written certification stating that no officer or employee of PRMP, its subsidiaries, or affiliates, will derive or obtain any benefit or profit of any kind from this vendor's contract. Invoices that do not include this certification will not be paid
 - b. Provide PRMP with a summary, for time and materials related costs, of hours for services rendered inside and outside Puerto Rico as well as outside Puerto Rico for each vendor resource

- c. Provide PRMP with a list of all deliverables and project services completed within an invoice period, as well as evidence that the PRMP has accepted and approved the work
- d. Provide PRMP with three (3) physical and one (1) electronic invoice packages in support of the PRMP's review and approval of each invoice
 - i. Invoice Package #1 – Original Signature
 - ii. Invoice Packages #2 - #3 – Hard Copy
 - iii. Invoice Package #4 – Electronic
- 15. The vendor must use industry-standard project management standards, methodologies, and processes to help ensure the project is delivered on time, within scope, within budget, and in accordance with PRMP's quality expectations. PRMP utilizes the Project Management Institute® (PMI®) Project Management Body of Knowledge (PMBOK®) methodology.
- 16. The vendor must provide increased staffing levels if requirements, timelines, quality, or other standards are not being met, based solely on the discretion of and without additional cost to PRMP. In making this determination, PRMP will evaluate whether the vendor is meeting deliverable dates, producing quality materials, consistently maintaining high quality and production rates, and meeting RFO standards without significant rework or revision.
- 17. The vendor must agree that PRMP retains ownership of all data, procedures, applications, licenses, and materials procured or developed during the contract period.
- 18. The vendor must provide evidence that staff have completed all necessary forms prior to executing work for the contract.
- 19. The vendor staff must not have the capability to access, edit, and share personal information data, with unauthorized solution users, including but not limited to:
 - a. Protected Health Information (PHI)
 - b. Personally Identifiable Information (PII)
 - c. Financial Transaction Information
 - d. Social Security Administration (SSA) data including, but not limited to: family, friends, and acquaintance information

By signing below, I certify that I have reviewed these Mandatory Requirements in their entirety and agree that the vendor meets, and will continue to meet, each of these Mandatory Requirements in full.

V2A Consulting

(Company)

 Director

(Representative Name, Title)

787-919-7303 / 787-919-7313

(Contact Phone/Fax Number)

03/18/22

(Date)

Attachment F: Response to Statement of Work

1. Approach to Scope and Requirements Management and Expertise

Scope management is critical to ensure that projects include all the work required, and only the work required, to complete them successfully. Project charters will be developed detailing project objectives, goals, risks, constraints, as well as items that are in and out of scope. An example is shown in **Figure 7**.

The Scope Management Plan will detail a LEAN process to define, control, verify and manage scope. We understand that scope creep is a real threat in these types of projects, so this service area will be closely managed in collaboration with Change Management to keep scope within the limits. We will facilitate periodic Scope Status and Review meetings with both service teams and decision-makers in order to adequately manage any deviations and to support implementation vendor in their product backlog refinement. One such meeting will be the Product Backlog Refinement meeting, which will be key in ensuring requirements are properly defined from the client's perspective and the "definition of done" is clear to all involved. The outcome of this meeting will inform the Time and Schedule Management. These meetings will include the Integration Management and Quality Management staff to ensure proper requirements management.

Figure 7: Sample Project Charter

Example Project Charter- Focus Area

Project X.X

Description: Project description; includes objectives and interim & final deadlines

Goals & Benefits

- Project Description
- Project Goal: What, where and when will be achieved
- What the project is focusing on and where the outcomes will be measured

Milestones

Date

- Significant events or key dates for major deliverables completion
- Includes start and target end-date

Team Members

Role

- Individuals who directly contribute to the project's deliverables, includes name and function
- Includes the project leader and sponsor

Risks and Obstacles

- Risks that may impact the project
- Obstacles to project completion and timeline

In and Out of Scope

- Defines the parameters and boundaries of the project – what will be taken into consideration and what will not

Logistics and Required Resources

- Details on team's organization, form, frequency and style, type of interactions, how information will be shared, roles within the taskforce, meetings set up, etc

2. Approach to Deliverables Management and Expertise

V2A will develop a Deliverable Management Plan detailing the review process and approach to approval of deliverables from all pertinent vendors. To avoid surprises or misunderstandings, all deliverables must have pre-defined expectations, requirements and content agreed upon prior to actual delivery.

A Microsoft SharePoint site will be maintained as a document repository to access, use and manage all required documentation. The Documentation Management Plan will detail how the project documentation will be managed. V2A believes that a successful deliverables management approach, as well as an effective communication management endeavor, requires a systematic and disciplined process for document management in a way that is transparent, accessible, traceable, user friendly, and in compliance with confidentiality rules. Documentation includes deliverables, acceptance criteria, meeting materials, artifacts, manuals, training materials and user guides, among others.

Some key steps that could be delineated in the plan includes:

- Ensuring all vendors and stakeholders are clear and aligned around the overall Deliverables Management Process
- Link the deliverables, budget, project milestones and risk management process to assess correct hierarchy, dependencies, and consistency throughout the enterprise project resulting in the establishment of critical deliverables path for a close risk monitoring
- Implementation of a deliverable's dashboard for easy and real time monitoring
- Implementation of standing and ad hoc meetings to discuss deliverables approvals, possible overlaps, feedback, expected delays (and its impact on time and budget), and corrective measures

3. Approach to Time and Schedule Management and Expertise

During the initiation phase, V2A will develop and submit a Project Work Plan. It will contain the Work Breakdown Structure (WBS) and all other necessary information such as effort and duration of tasks.

In addition, V2A will develop a Master Project Schedule containing all project work for the ePMO vendor, Implementation Vendor, PRMP and the PgMO. Any additional project service providers will be included as well. It will tie back to the WBS and identify milestones, tasks durations, start and end dates, interdependencies, resources, and work estimates. The Master Project Schedule will be created in MS Project and integrated with various other Microsoft platform tools. It will be extensible, sharable, and integrated with potential additional projects by linking it to a SharePoint site in Microsoft Teams.

Different stakeholders demand different information and level of detail. To that end, V2A will customize each stakeholder's view of the portfolio of initiatives. To simplify and streamline the creation of dashboards and reporting process, we will automate the process via Microsoft Power Automate flows, leveraging Microsoft Database Managers and Power BI for visualization. V2A has extensive experience creating Program Portfolio Reporting tools for clients in our multiple post-merger integration and implementation projects.

As an example, an executive view of a portfolio can show all projects status and health at a glance in **Figure 8 & Figure 9**.

Figure 8: Executive View Project Portfolio Status



A more specific portfolio view can provide a user with the ability to select timeframes to visualize key milestones:

Figure 9: Project Portfolio Milestones



V2A has extensive experience with SCRUM methodology. All our Engagement Managers are Certified Scrum Product Owners, and some are Certified Scrum Masters. Throughout our engagements, we apply the PMBOK framework married with Scrum principles and methodology. To measure performance and

report to stakeholders appropriately, we will collaborate with the Implementation vendor and execute a cadence of meetings to monitor and control the product schedule:

- Sprint planning meeting to ensure proper dimensioning of each team member's efforts during the period and cross-communicate the sprint goals across team members
- Daily scrum meeting (huddle) to plan the day and ensure any execution risk is managed
- Sprint review meeting to review internal deliverables for the period
- Product backlog refinement meeting with key stakeholders to ensure proper definition of requirements and scoping of deliverables as the project evolves, as mentioned in section F.1 above, Scope and Requirements Management
- Retrospective meeting with all project teams at an agreed upon frequency, to review project progress, share learnings across project teams and ensure alignment

All events are geared at using all team members' time efficiently with the goal of continually clarifying the client's needs and advancing the execution of project deliverables. The outcome of these meetings will feed into the Schedule Management Plan and will inform our Scope Management and Deliverables Management activities.

All the above is geared at supporting the PgMO in ensuring compliance with the Integrated Master Schedule.

4. Approach to Human Resources Management and Expertise

Human Resource planning is critical to ensure adequate bandwidth to successfully implement projects. V2A will identify and document project roles and responsibilities, as well as reporting relationships of all resources involved at the project and enterprise levels. This will result in a Staffing Management Plan with organizational charts identifying all staff across vendors and projects. As part of the staffing management, we will ensure adequate processes are in place to manage on-boarding and off-boarding of resources, including systems access and training. We understand the importance of relying on highly skilled and qualified resources to deliver the work. Throughout the life cycle of the project, the ePMO will maintain a close pulse on the performance of key resources and manage and/or escalate any staffing-related issues on a timely manner.

Additionally, V2A will prepare and maintain a RACI matrix documenting the responsible, accountable, consulted, and informed role and individuals which we consider critical to ensure during the entire project that each of the players is clear about everyone's roles, responsibilities and scope avoiding rework, overlaps or gaps that ultimately translates in delays and increased costs.

Furthermore, even if the project has well-established roles, responsibilities and scopes, key project milestones may require a more intensive stakeholder interaction for which a properly agreed RACI Matrix exercise can help avoid friction and rework between parties.

Below, **Figure 10** shows an excerpt of a detailed RACI matrix (showing only the first phase out of 5 and only two stakeholders for demonstration purposes) developed by V2A's OCM Support Team in the implementation of MEDITI3G to provide clarity to a large array of stakeholder from client and vendors

involved in the End User Training phase, of the different functions and activities, the accountable and responsible parties and who should be consulted and informed.

Figure 10: Detailed RACI Matrix

| | PRMP | | | | | | PMO | | | |
|--|-----------|---------------|-------------|----------|-----|-----------|-------------|----|----------------|----|
| | Exc. Dir. | Training lead | Policy lead | Trainers | PMO | Reg. Dir. | OCM Liaison | PM | Policy support | QA |
| EUT | | | | | | | | | | |
| Planning and Scheduling | | | | | | | | | | |
| Identify schedule changes | | A | | | | R | | | | |
| Schedule updating based on Region changes | | I | | | | I | | | | |
| Update lists in Moodle | | A/R | | | | | | | | |
| Check attendance in room | | A | | R | | | | | | |
| Register attendance in Moodle | | A/R | | | | | | | | |
| Identify schedule changes based on final verification | | A | | I | | I | | | | |
| Schedule updating based on Final verification results | | I | | | | I | | | | |
| Identify schedule changes based on UAT retest | | I | | | | | A | | | |
| Schedule updating based on UAT retest | | I | | I | | I | | | | |
| Manage trainings overflows | | A | | | | | | | | |
| Identify vaccinations schedule conflicts with EUT | | A | | | | R | | | | |
| Vaccination scheduling and adjustments | | | | | | | | | | |
| Send of Training Sessions invitations | | A | | | | | | | | |
| Send email with forms instructions and links to be distributed to regional Directors | | | | | A | I | | | | |
| Completion of forms | | | | | I | A/R | | | | |
| Recollection and validation of forms completion | | I | | | A/R | | | | | |
| Attendance tracking | | A | | R | | | | | | |
| Administer training evaluations | | A | | R | | | | | | |
| Analyze evaluation results | | A | | | | | | | | |

5. Approach to Risk and Issues Management and Expertise

V2A will manage and monitor all risks and issues that arise during the project implementation, develop mitigation strategies, and assess the potential impact related to cost, quality and timeline of projects. V2A will develop a Risk and Issues Management Plan outlining a LEAN process for identifying, tracking, managing, mitigating, and resolving risks and issues that could negatively impact the project. A Risk and Issue Register will be used to keep track of all risk and issues categorized by type, severity, probability, and owners.

To that effect, our risk and issues management approach begins with clarifying parties' level of authority and decision making starting from the steering committee down to each Project Specific Team, leveraging on the RACI matrix exercise mentioned above.

Another key component, is to embed the risk and issues management process into the rhythm of the project so that periodically (weekly or biweekly) each Project Specific Team in their meetings dedicates time and energy to measure, assess and document any deviations (due to delays or unexpected events) from planned targets and milestones and, in that assessment, identify if the risk or issue requires the involvement of another party, if it requires escalation, or if it can be managed within the project specific team's or vendor's scope.

We believe that risk and issues should be managed by the people closer to it and that they should be empowered and supported to manage the event based on their knowledge of the situation and their

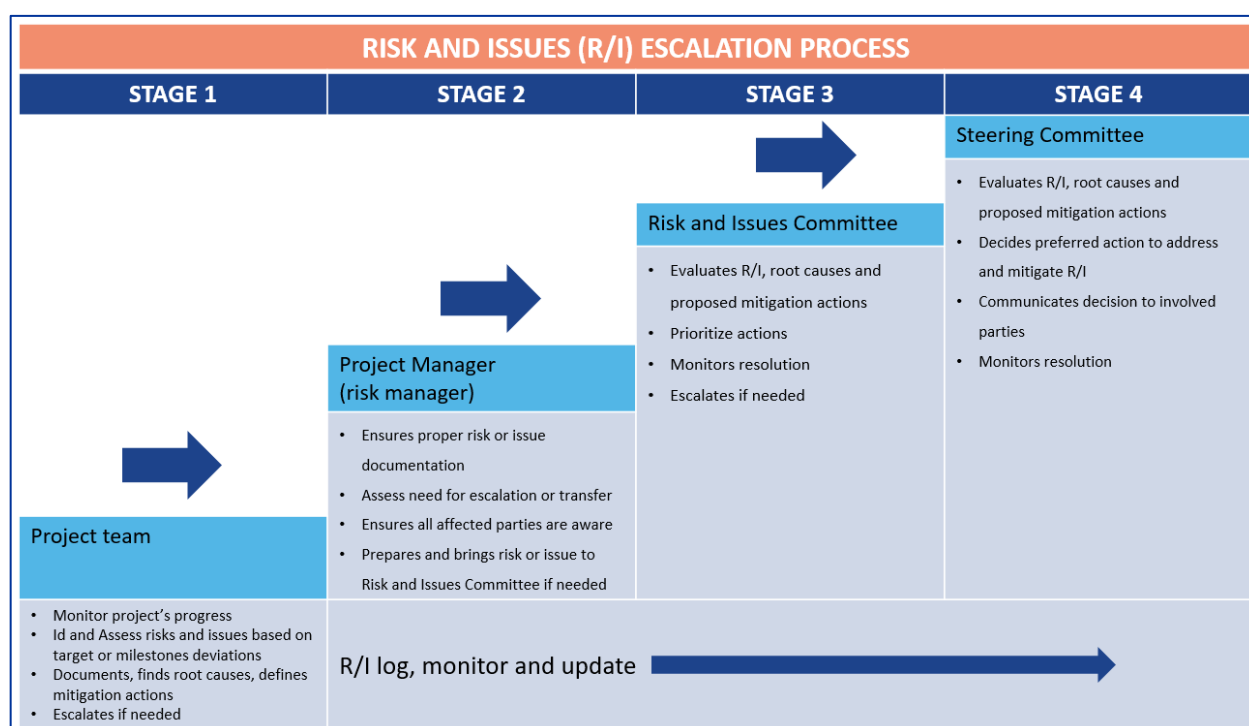
matter expertise. Failing to do this typically results in excessive risks and issues escalation, delaying the decisions and compromising the targets. However, if a risk or issue cannot be solved at the level in which it appears, V2A will ensure that the transference or escalation of a risk or issue is accompanied by a brief analysis of root causes and possible action to avoid or mitigate the risk or issue so that the receiving party has the information required to manage.

Conversely, when a risk or issue is transferred or escalated, it still requires feedback and updates towards the party who identified it in the first place, as well as to the other parties affected.

Finally, as part of the project's governance and the communications management plan, V2A will implement and facilitate a dedicated forum with key stakeholders from the client and vendors, to discuss and monitor risks and issues, identify additional implication, ensure proper prioritization, assess the viability of the mitigation actions proposed, and determine additional actions when required throughout the project's lifespan.

V2A will strive to finetune this critical aspect of the ePMO with PRMP and the rest of the vendor community. Below, an example of an escalation diagram from a previous engagement in **Figure 11**.

Figure 11: Risk and Issue Escalation Process



6. Approach to Budget and Cost Management and Expertise

Cost management is an integral part of the classical project management triple constraint, together with scope and time. V2A actively manages the interactions among the three to ensure customer satisfaction.

V2A will manage and keep track of the budget and actual costs on an on-going basis. Keeping a close eye on all vendors to ensure deliverables are met without going-over budget will be the main driver. A Cost

Management Plan will be submitted detailing the process to estimate, budget, manage, monitor and control costs throughout the lives of all projects.

This service area will be worked jointly with the Change Management area to ensure the impact of any change requests on budget and cost projections is captured. Close collaboration with PRMP's finance and accounting department will ensure that PRMP's financial resources are being managed appropriately.

In addition, we will closely integrate the Scope and Requirements, and Time and Schedule service areas to monitor any variances and impact across areas.

Finally, additional mechanism that V2A could also implement is a dashboard to provide visibility of budget status in relation to time, milestones and deliverables to facilitate the analysis and conversations around the financial health of the project.

7. Approach to Integration Management and Expertise

We believe a properly staffed and functioning ePMO should play the critical role of project integrator. With respect to the MES program, the project integrator role will ensure that MES projects being pursued concurrently are properly coordinated, which:

- enables the optimal use of project resources,
- mitigates implementation risks by addressing system interoperability and interface concerns early,
- facilitates less burdensome implementations, and
- results in shorter system implementations.

We have purposely structured our proposed ePMO to serve in the role of project integrator. We will establish and perform this function as follows:

- A member of our ePMO will serve as project integration manager who will work with the ePMO project leads, their vendor counterparts and the ePMO project administration team to review and optimize the implementation plans of the various MES projects. The optimization of the plans will reflect the need to sequence the projects and harmonize the timing of certain project activities to account for project interdependencies, availability of constrained resources, and the priority associated with deploying certain system functionality (e.g., to meet federal compliance requirements).
- The project integration manager, working with the ePMO project leads and vendor counterparts, will collaborate in the continuous evaluation of project progress and management of project issues to, as needed, determine whether and how to revise implementation plans to ensure necessary integration.
- The project integration manager will participate in select project management meetings to continuously monitor project status and progress and as needed, intervene to ensure project integration is sustained as individual project pressures and issues surface.

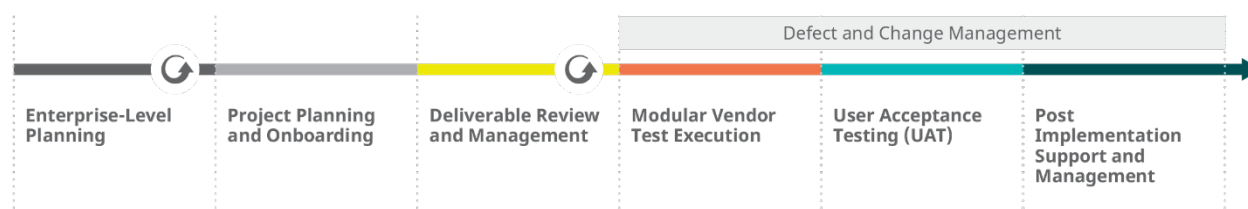
Our proposed project integration lead, Wade Miller, has played an integral role in project integration in his work with South Dakota's Department of Social Services (DSS) going back to 2012. Mr. Miller worked with DSS to develop an information technology roadmap for the entire department, including its Medicaid

division, to facilitate project integration. Mr. Miller also worked with DSS to develop a procurement for the system now known as BEES – the Benefit Eligibility and Enrollment System – that incorporated requirements for leveraging the procured platform to support program management functions across multiple DSS programs (SNAP, TANF, childcare and energy assistance). Mr. Miller has extensive experience working with Gainwell, Georgia’s MMIS vendor at the time he was CIO of Georgia’s Medicaid agency, and IBM/Redmane – the vendors selected by DSS to implement BEES.

8. Approach to Testing Management and Expertise

Our approach to MES testing management ensures the requisite level of testing oversight, guidance, control, and assurance is provided throughout the implementation. Our testing management team will work with Puerto Rico’s MES project teams and its vendors on test plan development and, subsequently, test execution oversight of the vendor’s testing activities. Throughout these activities, we will provide guidance based on best practices and relevant experience for internal/unit testing, test planning and execution, and go-live preparedness. Given the modular nature of MES, our work will be iterative since it will be repeated across multiple modules. We will support and oversee all modalities of testing, including but not limited to unit (internal vendor) testing, integration testing, performance testing, security testing and – ultimately – user acceptance testing (UAT). Since testing activities are critical activities within an MES module implementation, in addition to directly engaging with testing resources from the PRMP and its vendors our testing management team will participate in other project activities (refer to **Figure 12**).

Figure 12: MES Testing and Related Project Implementation



One area that will ensure successful test planning and execution by the modular vendor for PRMP is our testing leadership providing oversight and review of the design and execution of testing plans. Test plans should be comprehensive, thorough and result in actionable test findings. Moreover, testing plans need to be developed and executed for all modalities of testing and executed in the appropriate sequence.

Our team understands that testing helps pinpoint defects in information systems and underlying infrastructure so appropriate, timely corrections can be made. Our testing team has coordinated, conducted, and supported testing activities across multiple projects and understand the critical role testing plays in the system development and implementation lifecycle. Additionally, our team has developed testing protocols and participated in testing activities specific to the two major systems being implemented by the PRMP: Gainwell’s interChange platform and modules (MMIS), and the IBM Cúram Enterprise Social Program Management platform (MEDITI3G).

We structured our proposed ePMO team to include two resources that will oversee testing protocol development and testing activities for the Gainwell and MEDIT3G projects. In this capacity, we will conduct the following activities:

- Review and, as needed, recommend refinements to testing plans; the review will include ensuring that the ePMO-maintained enterprise-level requirements traceability matrix is reflected in the testing plans proposed by the MES vendors
- Establish standards for determining whether testing activities were completed to satisfaction
- Monitor testing activities – review test-related documents and participate in select test sessions
- Participate in test review meetings and work with the ePMO project leads and their vendor counterparts to rapidly triage, prioritize, and stage the resolution of defects and system enhancements identified through testing
- Attest to the satisfactory completion of testing activities
- Work with our project integration lead to ensure testing activities are properly harmonized and sequenced and account for resource availability and constraints amongst the pool of resources that could participate in testing activities

Our proposed testing management lead – Alex Grodner – has extensive experience supporting testing plan development and overseeing testing. Alex is serving as user acceptance testing lead as part of the HMA team that is managing the implementation of the IBM Cúram Enterprise Social Program Management platform in South Dakota (in which RedMane is the system integrator). Previously, Alex also led testing activities for North Carolina’s implementation of Cúram (codenamed NC FAST).

9. Approach to Quality Management and Expertise

Our approach to quality management will ensure that the MES vendors design and execute plans that result in MES projects progressing in accordance with established objectives and milestones and MES modules meeting functionality, availability, security, and performance expectations. Additionally, we believe that true quality management on a major IT project goes beyond ensuring the quality of the systems being implemented - we will assure that through effective requirement elicitation and elaboration and multiple modalities and levels of testing. In our experience, true quality management requires exceptional commitment to meeting the needs of all project stakeholders by providing them with timely, actionable advice on both programmatic and technology matters. To that end, our quality management team includes resources experienced in implementing information systems – including the same Gainwell and IBM platforms being implemented in Puerto Rico – and ensuring that those systems effectively support the programmatic functions for which those systems were acquired. Additionally, our quality management team has resources that have played critical roles in the implementation of health care programs in Puerto Rico, know and understand Puerto Rico’s idiosyncrasies and unique economic and political circumstances, and have relationships of trust with many key players in the MES projects.

We propose participating in the review of project deliverables, the development of project and information system performance metrics and the development of vendor service level agreements. We

will also participate in quality review meetings and work with the ePMO project leads and their vendor counterparts to rapidly triage, prioritize and stage the resolution of any deviations from established, mutually agreed expectations for project progress and system availability, security, and performance. Furthermore, we will formally attest to the satisfactory resolution of quality issues. These quality management activities will be performed such that:

- Requirement elicitation and elaboration processes promote capturing business requirements such that they can be translated into clearly articulated system requirements and specifications
- System specifications are thoroughly vetted to make sure specifications tie back to requirements and will lend themselves to comprehensive, thorough testing
- Working with our testing management lead, confirm that testing procedures and systems, test cases and scripts enable the necessary depth and breadth of testing
- Working with our integration management lead, ensure that quality management activities are properly harmonized and streamlined across MES projects.
- SMART (specific, measurable, actionable, realistic, and time-based) performance metrics are developed that cover all critical aspects of both system implementation and operations and, as such, provide a comprehensive, balanced view of project progress, system performance and vendor performance
- The vendors supporting the system implementations and operations have the means to collect and report the information required to monitor and assess their performance in as close to real time as possible

Our quality management team will bring to the ePMO an unparalleled wealth of Medicaid program experience and expertise including in-depth knowledge of Medicaid program operations and federal requirements and a repository of how states and territories across the U.S. have implemented MES modules. Our team is also well versed in the design of the Government Health Plan (GHP) and the Puerto Rico Health Department's and Health Insurance Administration's program management responsibilities. Finally, our quality management team lead Luis Sylvester was the Governor's point person for the implementation of the Gainwell MMIS platform implementation in the U.S. Virgin Islands and then transitioned to leading the Gainwell team. As such, Mr. Sylvester's experience and perspective will be invaluable to the establishment of an effective quality management plan for the MMIS Phase 3 project.

10. Approach to Communications Management and Expertise

V2A brings a wealth of experience in effective communication and stakeholder management. We believe that the right information based on facts and data, should be available to the proper decision-making bodies so that dialogues are well informed to make strong, consequential decisions in a timely fashion. To ensure a consistent project governance, our approach to communications entails the management of four different levels of stakeholders for which content, tone, frequency and even language (English and Spanish) are seamlessly adapted:

- People and entities sponsoring the project (Federal and local government, DoH, CMS)

- Project's internal stakeholders are the people and entities directly participating in the project (PRMP leadership, PRMP project teams, vendors and other agencies involved)
- PRMP personnel not involved in the project
- General public

A typical ePMO high-level communication management matrix is shown in **Figure 13**, below:

Figure 13: Example of ePMO Communication Matrix

| LEVEL | AUDIENCE | FORUMS/ CHANNEL | PURPOSE | FREQUENCY |
|-------------------|---|--|---|----------------------------|
| External Sponsors | DoH Secretary, CMS representatives | Status updates | Status updates, monitor milestones | Ad hoc |
| | CMS | Certifications | | |
| Project | Project's leadership | Steering Committee | Ultimate decision-making body for the project | Monthly, Ad hoc |
| | Projects leads and teams | Weekly updates | Operational body, monitor progress | Weekly |
| Personnel | Project's leadership, general personnel | Townhalls | Status updates, Q&A, collect people's sentiment | As per communications plan |
| | Employees and direct supervisor | Regular operation meetings (Cascading) | Relevant project update and Q&A | As usual |
| General Public | General public | Traditional and social media | General information | As per communications plan |

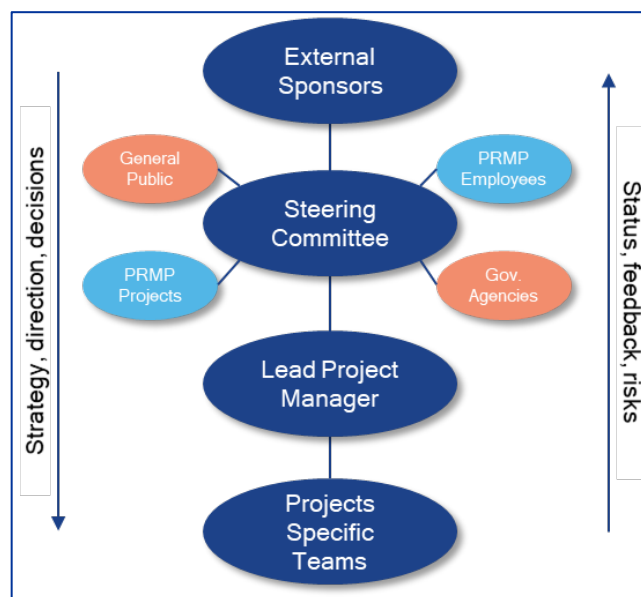
Focusing on the Project level, a more robust and detailed structure is required (refer to **Figure 14**). A carefully designed and executed architecture for communication management is of paramount importance for an effective information and decision flow, allowing stakeholders not only to communicate progress but also to listen and receive relevant input and actionable feedback.

Figure 14: Example of Project Specific Communication Matrix

| GOVERNANCE FORUMS | | | | | | | | | | |
|-------------------|---------|--------|---------|--------------|--------|-----------|-----------|----------|------------|-----------|
| COMMITTEE | PURPOSE | AGENDA | MEMBERS | | | | FREQUENCY | DURATION | INPUT FROM | OUTPUT TO |
| | | | LEADER | PARTICIPANTS | GUESTS | SECRETARY | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |

Moreover, establishing an enterprise PMO will allow for more seamless collaboration and communication across the various Medicaid projects. In **Figure 15**, a representation of information and decision flow:

Figure 15: Information and Decision Flow



A Communication Management Plan will be developed identifying all stakeholder groups with respective roles (WHO), outlining key messages to be shared with each group (WHAT), defining the preferred methods of communication (HOW) and determining the frequency of communication (WHEN). We will facilitate all on-going meetings with key stakeholders, including publishing meeting agenda and minutes in a timely fashion. We understand the importance of communicating projects' progress and results in an effective manner to federal and state reviewers. V2A's presentations are best in class in delivering crisp, clear messages tailored to specific audiences.

11.Approach to Change Management and Expertise

Changes in scope, resources, schedule and/or budget are an inevitable part of any transformation process. What differentiates the success of a project is how these changes are monitored and managed. Our philosophy is that we work as partners, managing change with you. We don't just throw changes over the fence; we work hand in hand with you to monitor them and avoid surprises. A LEAN process will be designed to manage change requests and will be clearly demonstrated in the Change Management Plan. Change Requests will be managed with a form similar to the one shown in **Figure 16**. All changes will be documented and assessed through a formal board in charge of approving changes and estimating impacts of the changes on the project. Weekly and monthly change management reports will be generated and discussed in the appropriate governance meetings.

Figure 16: Example Change Request Form

| FOR REQUESTOR USE ONLY | | | | |
|--|----------|---------|----------|----------|
| Request #: | | Date: | | WBS #: |
| Requested By: | | | | |
| Signature: | | | | |
| Position: | | | | |
| Reason for Change: | | | | |
| FOR PROJECT MANAGEMENT TEAM EVALUATION AND RECOMMENDATION USE ONLY | | | | |
| Impact : | Scope | Quality | Budget | Schedule |
| Details and Comments: | | | | |
| Additional Resources: | | | | |
| Estimates Costs: | | | | |
| Requested By: | | | | |
| Signature: | | | | |
| Date: | | | | |
| FOR CHANGE CONTROL BOARD USE ONLY | | | | |
| Decision: | Approved | | Rejected | |
| Details and Comments: | | | | |
| Change Control Board Chair Name: | | | | |
| Change Control Board Chair Signature: | | | | |
| Date: | | | | |
| Date when decision is discussed with Project Manager: | | | | |

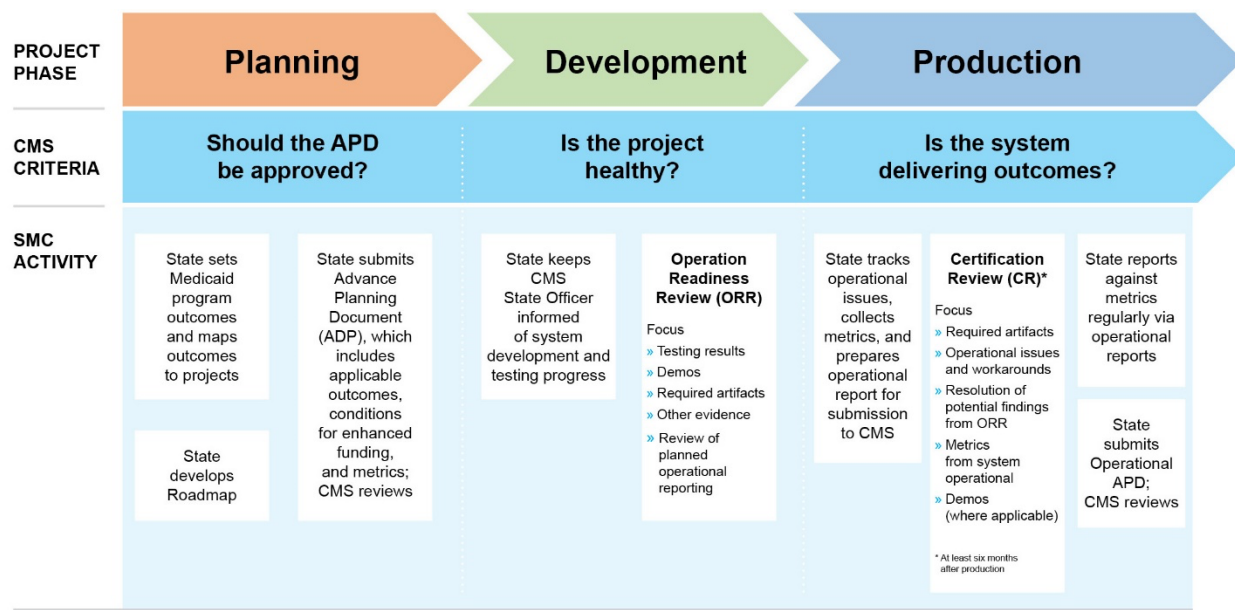
12. Approach to Certification Management and Expertise

Our team has in-depth knowledge of CMS certification requirements for all MES modules and is currently supporting certification activities for South Dakota's equivalent of MEDITI3G. Our team has specialized knowledge of the still-evolving *Streamlined Modular Certification (SMC)* requirements which CMS has been implementing in phases, including on the MEDITI3G project. Moreover, our team includes resources who have worked for CMS and were directly involved in the review and approval of advance planning documents (APDs) and the development and administration of certification requirements. As such, we are optimally positioned to support the PRMP as it engages with CMS on certification activities.

Our team will support PRMP through the SMC life cycle, illustrated in **Figure 17**, by leading certification planning, monitoring and reporting meetings, continuously reviewing certification activity progress, providing expert guidance on certification preparedness activities, reviewing certification artifacts and making recommendations for improvement as needed, and maintaining the certification artifact repository while ensuring its integrity. We anticipate holding certification status meetings weekly; our

team will schedule, lead, and provide documentarians for these meetings whether they are held in person or virtually. We recommend the meetings be attended by representatives from the PRMP, the PgMO, our ePMO project leads and the various vendors. We will document and track risks, issues and action items specific to the certification phase of the project.

Figure 17: Streamlined Modular Certification Timeline



A more detailed breakdown of certification activities is provided in **Appendix 1**.

The Certification Management workstream will be led by Chip Cantrell and supported by Lee Repasch. Chip currently serves as the Deputy Project Manager for the state of South Dakota's implementation of the IBM Curam platform being implemented in Puerto Rico as MEDIT3G. In that capacity, Chip developed the work breakdown structure for the SMC workstream within that project's master implementation plan. Chip also supported the state in the development of outcomes and key performance metrics and works directly with CMS and its contractor (MITRE) on certification planning activities. Prior to joining HMA, Lee worked for CMS as a member of the data and systems group which was responsible for setting standards for state acquisition, implementation, and operation of Medicaid enterprise systems. Lee was responsible for reviewing requests for federal funding for MES and assuring systems aligned with CMS requirements for federal support. Lee also helped states secure health information exchange and Medicaid EHR incentive program administration funding.

13.Approach to Transition to Maintenance and Operations Management

V2A believes in close integration with client personnel, and we carry out operational transitions as part of our engagements. The transition process is an orderly one kicked-off with a planning session with project

sponsors and key stakeholders to determine timeframe, scope, client personnel involved and needed involvement from other third-party vendors to ensure client staff has the knowledge and confidence to carry out the necessary activities once V2A has disengaged. We make sure that the transition process is not an isolated event within a department, but an orchestrated process that belongs in a broader change management plan.

Typical activities carried out in the turnover and closeout phase include shadowing of client staff, one-on-one sessions to coach staff in the new or modified functions, and training sessions to build capabilities and facilitate alignment among staff.

In addition to training, V2A provides clients with all project documentation in its final form and conducts any necessary transfer of assets and client access procedures.

Within the first 120 days after execution of this contract, V2A will provide a Turnover and Closeout Management Plan that will provide the approach, timeline, staffing required, and main activities, among others.

Attachment G: Terms and Conditions Response

This section describes the Terms and Conditions of the RFO, the PRMPs expectations of vendors, and compliance with federal procedures.

1. Title Page

The vendor should review Attachment G: Terms and Conditions Response signing each provided signature block using blue ink in order to note the vendor's acknowledgment and intent of compliance. The vendor should identify any exceptions to the Terms and Conditions. If exceptions are not noted in Attachment G: Terms and Conditions Response of the RFO but raised during contract negotiations, PRMP reserves the right to cancel the negotiation if, at its sole discretion, it deems that to be in the best interests of PRMP.

2. RFO Terms and Conditions

RFO Terms and Conditions consist of provisions throughout this RFO. Moreover, these provisions encapsulate instructions, State and federal procedures, and PRMP's expectations of the vendor when submitting a proposal. The vendor should understand and strictly adhere to the RFO Terms and Conditions. Failure to follow any instructions within this RFO may, at PRMP's sole discretion, result in the disqualification of the vendor's proposal.

Please provide an authorized signature stipulating the vendor's acknowledgment, understanding, and acceptance of these RFO Terms and Conditions.

Graciela Salcedo



03/18/22

Printed Name / Signature of Authorized Personnel


Date

3. Customary Terms and Conditions

The selected vendor will sign a contract with PRMP to provide the goods and services described in the vendor's response. The following documents shall be included in any contract(s) resulting from this RFO:

- Appendix 3: Service-Level Agreements and Performance Standards
- Appendix 6: Proforma Contract Draft inclusive of HIPAA Business Associate Agreement

Please provide a signature stipulating the vendor's acknowledgment, complete review, and acceptance of these documents.

| | | |
|--|---|----------|
| Graciela Salcedo |  | 03/18/22 |
| Printed Name / Signature of Authorized Personnel | | Date |

If the vendor is NOT taking exceptions to any of PRMP Customary Terms and Conditions, then the vendor needs to provide a binding signature stipulating its acceptance of these documents. If the vendor is taking exceptions to any of PRMP Customary Terms and Conditions, then the vendor should write 'Taking Exceptions' on the line below and should follow the instructions for taking exceptions, as listed in Attachment G: Terms and Conditions Response, Section 6: Exceptions.

| | | |
|--|--|----------|
| Graciela Salcedo |  | 03/18/22 |
| Printed Name / Signature of Authorized Personnel | | Date |

4. Mandatory Requirements and Terms

The following items are Mandatory Terms and Documents. Please be advised, the vendor should provide its affirmative acceptance of these items to move forward with consideration under this RFO.


- Attachment E: Mandatory Requirements
- Prior to the Contract resulting from this RFO is signed, the successful vendor must be registered with the "Registro Único de Proveedores de Servicios Profesionales" (RUP) from the Puerto Rico General Services Administration (ASG) and with the Puerto Rico Treasury Department (Hacienda) for the collection of sales and use tax (IVU) as a provider (if applicable) in the Internal Revenue Unified System (SURI). PRMP shall not award a contract, unless the vendor provides proof of such registration or provides documentation from the Puerto Rico Treasury Department that the Contractor is exempt from this registration requirement in the SURI system. The foregoing is a mandatory requirement of an award of a contract pursuant to this solicitation. For more information, please refer to the PR Treasury Department's web site <http://www.hacienda.pr.gov>
- Prior to the Contract resulting from this RFO is signed, the successful vendor must provide a Certificate of Insurance issued by an insurance company licensed or authorized to provide

insurance in Puerto Rico. Each Certificate of Insurance shall indicate current insurance coverages meeting minimum requirements as specified by this RFO. A failure to provide a current, Certificate of Insurance will be considered a material breach and grounds for contract termination. A list of the Insurance policies that may be included in this Contract are provided in Appendix 6: Proforma Contract Draft.

- A performance bond may be required for this RFO.
- Appendix 2: Service-Level Agreements and Performance Standards
- Appendix 6: Proforma Contract Draft inclusive of HIPAA Business Associate Agreement

Vendors that are not able to enter a contract under these conditions should not submit a bid.

Please provide an authorized signature stipulating the vendor's acknowledgment, understanding, and acceptance of the Mandatory Requirements and Terms stipulated in this section.

| | | |
|--|---|----------|
| Graciela Salcedo |  | 03/18/22 |
| Printed Name / Signature of Authorized Personnel | | Date |

5. Commercial Materials

Technology platforms that will be used by the ePMO will all be off the shelf, commercially available products, mainly Microsoft 365 based suite, including SharePoint, Teams, Planner, Power BI, MS Project among others. No proprietary materials will be used. PRMP will have full ownership of all materials developed throughout the engagement

6. Exceptions

No exceptions to PRMP's Terms and Conditions in this RFO will be submitted.

Appendix 1: Streamlined Modular Certification Activities

| Streamlined Modular Certification Activities | Project Phase |
|--|---------------|
| Planning | |
| 1. Map Medicaid program outcomes to project <ul style="list-style-type: none"> a. Review Agency and Business goals and objectives b. Identify State-specific outcomes | Planning |
| 2. Develop Roadmap <ul style="list-style-type: none"> a. As-is state b. To-be state c. Review MITA SS-A | Planning |
| 3. Develop draft State-specific outcomes and metrics | Planning |
| 4. Include Outcomes, Conditions for Enhanced Funding, and Metrics in APD <ul style="list-style-type: none"> a. Review PAPD for outcomes b. Include standards and conditions c. Include CMS-required outcomes and metrics d. Include any State-specific outcomes and metrics; linking these to the business needs, to the goals of the Medicaid program, or making sure the IT supports the policy, supports the Medicaid program, etc. | Planning |
| Development | |
| 1. Keep CMS informed of the development, testing, and certification planning progress as a part of Monthly CMS State Officer meetings and the Monthly CMS Status Report | DDI |
| 2. Create module Intake Form <ul style="list-style-type: none"> a. Establish Certification Documents Library in SharePoint or other project portal b. Grant access to the Certification Documents Library to applicable project resources c. Grant access to the Certification Documents Library at least 2-weeks to ORR | DDI |
| 3. Operational Readiness Review (ORR) <ul style="list-style-type: none"> a. Identify sources for required artifacts and evidence b. Gather artifacts <ul style="list-style-type: none"> i. Monthly Project Status Reports ii. Master Test Plan iii. Deployment Plan iv. Defect List v. Risk List vi. Independent Security Audit vii. Testing Results viii. Other Evidence c. Complete State portion of Intake Form d. Review plan for operational reporting with CMS e. Develop Certification Demonstration and Presentation for ORR <ul style="list-style-type: none"> i. Agenda ii. Presentation iii. Demonstration scripts iv. Participants, including support during the review (minutes, action items) f. Notify all participants, schedule meeting on calendars g. Schedule and conduct at least two mock review sessions h. Conduct ORR with CMS <ul style="list-style-type: none"> i. CMS review period (allow 30 – 45 days) ii. Cure Action Items iii. Conduct Go / No Go for Go-live | DDI |
| Production | |

| Streamlined Modular Certification Activities | Project Phase |
|---|-------------------------------------|
| <ol style="list-style-type: none"> 1. Operations <ol style="list-style-type: none"> a. Collect monthly KPI data <ol style="list-style-type: none"> i. Six months of data, begins first full month post-Go-Live b. Validate KPI data c. Provide input for Monthly CMS Status Report d. CMS Certification Review (CR) <ol style="list-style-type: none"> i. Submit Certification Request Letter and System Acceptance Letter to CMS (at least 30 days before CR) ii. Gather any legal non-disclosure and data-sharing agreements from CMS iii. Develop Certification Demonstration and Presentation for CR <ol style="list-style-type: none"> 1. Agenda 2. Presentation 3. Demonstration scripts 4. Participants, including support during the review (minutes, action items) iv. Notify all participants, schedule meeting on calendars v. Schedule and conduct at least two mock review sessions vi. Conduct CR with CMS <ol style="list-style-type: none"> 1. Cure Action Items 2. CMS Decision (Approx. 90 days) 3. Celebrate | <p>Operations & Maintenance</p> |

Appendix 2: Disclosure of Lobbying Activities

March 18, 2022

Puerto Rico Department of Health
Medicaid Program
268 Luis Muñoz Rivera Ave.
World Plaza – 12th Floor, Suite 12
San Juan, Puerto Rico 00918

RE: **Puerto Rico Medicaid Enterprise System
Enterprise Project Management Office Vendor Request for Offer
(2021-PRMP-MES-ePMO-003)**

Dear Selection Committee,

V2A, LLC certifies that no corporation was hired to perform lobbying activities in connection with RFO 2021-PRMP-MES-ePMO-003. No partner or employee of V2A is engaged in this type of activity. If you should have any questions, feel to contact us at gracielasalcedo@v2aconsulting.com or 787-919-7303.

Sincerely,

A handwritten signature in blue ink that reads 'Graciela Salcedo'.

Graciela Salcedo

V2A Director