Arizona Health Care Cost Containment System

Medicaid Enterprise System (MES), IV&V Services

Task Order YH23-0128

Date: June 14, 2023 | 03:00 PM AZT
To: Lisa Monreal, Senior Procurement Specialist

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June 14, 2023

Lisa Monreal
Senior Procurement Specialist
AHCCCS Division of Business and Finance
801 E. Jefferson, MD 5700
Phoenix, AZ 85034

Subject: Arizona Health Care Cost Containment System Medicaid Enterprise System Independent Verification and Validation, Task Order # YH23-0128

Dear Ms. Monreal:

Thank you for the opportunity to submit this response to the Arizona Health Care Cost Containment System (AHCCCS) Independent Verification and Validation (IV&V) for the Design, Development, and Implementation (DDI) of Arizona's Medicaid Enterprise System (MES). Based on our understanding of the project, our experience supporting state MES, and our dedicated focus on IV&V, we firmly believe that Public Consulting Group LLC (PCG) is the best-suited vendor to provide the IV&V services required to ensure the MES achieves its strategic modernization goals throughout this Design, Development, and Implementation (DDI) project. As you evaluate our response, please consider that our clients receive the following:

- ✓ **Minimal disruption** to everyday operations, thanks to well-defined assessment activities that set clear expectations for their staff while being flexible enough to tailor to special conditions or circumstances
- ✓ **Transparent access** to IV&V findings and concerns from staff who prioritize collaboration as a core value and communicate early and often to avoid surprises
- ✓ **Consistent, predictable** results across activities and throughout the project, thanks to the rigorous training and certification program provided to all our IV&V professionals
- ✓ **Reports, documentation, and other assessment artifacts** refined by a continuous improvement process driven by over 30 years' worth of lessons learned

Broad Public Sector Experience

The PCG family of companies has experience in all 50 states, six Canadian provinces, and the European Union. PCG and its affiliates employ more than 2,000 professionals committed to providing our clients with proven solutions and outstanding customer service. PCG provides high-quality IV&V services nationwide, focusing on public sector organizations and programs. In our 30+ year history, we provided these services and quality assurance (QA) and oversight services on more than 200 planning, procurement, and DDI projects. We offer AHCCCS insights from performing IV&V over complex, multi-stakeholder IT projects, both large and small. We will use these insights in the early detection of software development risks and other project risks in each phase of the project.

Extensive State of Arizona Experience

PCG has worked successfully with Arizona for almost 15 years across eleven agencies. AHCCCS will benefit from PCG's experiences providing IV&V services to many Arizona state agencies, including the Department of Economic Security (ADES), the Department of Public Safety (AZDPS), the Department of Corrections (ADC), the Department of Administration (ADOA), and the State Procurement Office (SPO) on complex

system modernization projects. We developed a strong partnership with each agency and have provided support and reporting to the Information Technology Authorization Committee (ITAC) and the Joint Legislative Budget Committee (JLBC). In addition to our Arizona experience, we have provided IV&V services over the Hawaii Prepaid Medical Management Information System (HPMMIS) system, so we have familiarity with that system's structure and functionality, including the ServiceNow platform and modules.

Refactoring/Replatforming Experience

PCG understands the approach AHCCCS has chosen to modernize its MES and the potential complexities that come with this. AHCCCS will benefit from our experience with system refactoring, which has revealed several key areas, including the importance of data migration, intuitive user interfaces, and data entry procedures, the importance of automated interfaces, and the effort required to comprehensively document all current interfaces, MES subsystems, and access to business rules which can be easily updated, and improvements to document management, caseload management, and the Help Desk. As the AHCCCS is converting and refactoring the PMMIS and HPMMIS system to Microsoft Azure cloud technology, AHCCCS needs an IV&V vendor who understands the latest technologies and industry best practices. In total, we have provided IV&V services on 12 refactoring projects. We will apply our knowledge gained and lessons learned from supporting these projects to refactoring the HPMMIS/PMMIS.

The PCG Advantage with Eclipse IV&V®

PCG operates an IV&V Center of Excellence (CoE) to ensure that all PCG IV&V clients benefit from the collective knowledge gained on IV&V engagements and that our methodologies and tools are continuously improved to remain current, relevant, and applicable. From this CoE, PCG created **Eclipse IV&V®**, an integrated framework of processes, tools, templates, and artifacts—and coupled it with a training and certification program designed to deliver high-value IV&V services to PCG clients. The Eclipse IV&V framework focuses IV&V services on project success and is the foundation of our proposed approach.

PCG Staff

PCG's internal network of more than 2,000 consultants nationwide provides a deep resource pool of subject matter experts (SME) with extensive project management and IV&V experience in waterfall and Agile development environments across various State agencies. We are proposing a team of dedicated IV&V professionals supported by subject matter experts in Medicaid, DDI, ServiceNow, and Centers for Medicare and Medicaid Services (CMS) certification on development projects of similar size and complexity to the AHCCCS MES Project and understand the CMS vision for a modular approach.

Should questions arise, or if you need additional information regarding the services offered, please do not hesitate to contact Rhonda Brinkoeter at (719) 467-7046 or services@pcgus.com.

Sincerely,

Mitchell Dobbins
Practice Area Director
Public Consulting Group LLC

AHCCCS
Arizona Health Care Cost Containment System

SOLICITATION AMENDMENT #1		
YH23-0128 Independent Verification and Validation (IV&V)	Solicitation Due Date: **June 14, 2023 3:00 pm Arizona Time**	Procurement Officer: Lisa Monreal Email: procurement@azahcccs.gov

A signed copy of this amendment must be submitted with your solicitation response.

This Solicitation is amended as follows:

1. The attached Answers to Questions are incorporated into this solicitation amendment.

The attached Answers to Questions is incorporated into this solicitation amendment.

OFFEROR HEREBY ACKNOWLEDGES RECEIPT AND UNDERSTANDING OF THIS SOLICITATION AMENDMENT.	**THIS SOLICITATION AMENDMENT IS HEREBY EXECUTED ON THIS DAY, IN PHOENIX, AZ.**
SIGNATURE OF AUTHORIZED INDIVIDUAL:	SIGNATURE: **SIGNATURE ON FILE**
TYPED NAME: Mitchell Dobbins	TYPED NAME: Meggan LaPorte, CPPO, MSW
TITLE: Practice Area Director	TITLE: Chief Procurement Officer
DATE: June 14, 2023	DATE:

AHCCCS Arizona Health Care Cost Containment System	**QUESTIONS AND ANSWERS FORM**
	Independent Verification and Validation (IV&V) **YH23-0128**
	Questions shall be submitted electronically on this form to Procurement@azahcccs.gov no later than **May 22, 2023, 3:00PM ARIZONA TIME**

Question #	VENDOR NAME	Paragraph # orTitle	Page #	Vendor Question	AHCCCS Response
1.	PCG	Sec. 6.1	Pg. 3	Section 6.1 describes providing Quarterly Reports covering all the areas and associated templates. What does AHCCCS mean by templates for each of those areas?	AHCCCS will work with vendor on templates to be used for each project.
2.	PCG	Sec. 9.2.4	Pg. 5	Is there a page limit for the key staff resumes?	No. Provide key staff resumes and work history for the last five (5) years, their roles in each position, and two (2) individuals references. Include emails and phone number for each references submitted.
3.	PCG	Attachment A	Pg. 8	The Optional Services B in Attachment A includes a line item for each potential ServiceNow option. Can AHCCCS provide the anticipated schedule for each module so we can align our cost estimate to the appropriate year, or is it expected that these costs would be negotiated at the point that AHCCCS chooses to exercise the optional services?	We do not believe we will need the IV&V for all SNOW modules. We would like pricing broken down by each SNOW modules as listed in Attachment A.

4.	PCG	Sec. 9.3.2	5	For the price proposal, it says to "Provide a breakdown of the implementation of the following ServiceNow Modules." Should we provide the cost to provide IV&V services over AHCCCS and their vendor to implement those, or for us to do the implementation?	We are only looking for the cost to provided IV&V services over our implementation vendor.
5.	PCG	Sec 3 and 5.4	2 and 3	The Project Timeline in Sec. 3 states the contract shall not exceed December 2025 and the Timeline in Sec. 5.4 says all projects are expected to be live by the end of the calendar year 2026. Will AHCCCS confirm the not to exceed timeline?	Project will be extended through 2026 with programs approval.
6.	PCG			Please clarify if we should provide the cost to provide IV&V services over AHCCCS and their vendor to implement those or for us to do the implementation?	IV&V would not be doing implementation work. Their feedback, if AHCCCS agrees, would be sent to the system implementation vendor to correct.

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1 METHODOLOGY AND APPROACH

AHCCCS seeks IV&V services to increase the likelihood of success for MES Roadmap projects, including System Integration (SI), ServiceNow, and the mainframe modernization project. PCG brings experienced staff, proven methods, and a collaborative approach refined through more than 25 years of successful IV&V engagements with public sector clients.

By partnering with PCG, AHCCCS will receive high-quality IV&V services based on the following:

- A mature, repeatable, and standards-based framework that results in consistent and accurate IV&V findings.
- A customizable toolkit that is continually refined to meet the needs of our clients and the demands of the industry.
- A risk-based approach that focuses on identifying risks early in the project when mitigation is typically more cost-effective and easier to implement.
- Collaborative communication that confirms assumptions and facts before reporting findings formally, ensuring project leadership is never surprised by the contents of our reports and has timely information to make confident, informed decisions.

1.1 A PROVEN FRAMEWORK

Eclipse IV&V® is an integrated framework of processes, tools, templates, and best-in-class artifacts that ensure a consistently high level of service to PCG clients. Key attributes of Eclipse IV&V include the following:

- ***Independent.*** Being independent and unbiased allows us to focus on what matters most to the success of the project and our clients. By embracing independence, AHCCCS can trust that our assessments, risks, and mitigation strategies are focused solely on project success and not selfish interests.
- ***Flexible.*** Understanding the ever-changing nature of IT projects in the public sector, we know the importance of adjusting quickly and efficiently. Working with our clients to focus on what matters most to the project requires flexibility; this is anticipated when we build our schedules and update our checklists and guides.
- ***Proven.*** PCG has completed over 100 successful IV&V engagements in the past 25 years, providing a wealth of experiences and lessons learned that have been built into our tools and processes.
- ***Standards-Based.*** Eclipse IV&V conforms to the Institute of Electrical and Electronics Engineers (IEEE) Standard 1012 Standard for System, Software, and Hardware Verification and Validation and incorporates other standards from IEEE and the International Organization for Standardization (ISO).

The Eclipse IV&V Framework revolves around three core components: experienced staff, proven tools, and IV&V planning.

Experienced Staff. The PCG consultants assigned to the MES IV&V project will understand the problems and complexities that arise in public-sector IT projects. PCG is known for hiring and retaining high-quality people who have real-world experience in IT project management, software development, and systems implementation. Our IV&V consultants are trained and certified in Eclipse IV&V and have ongoing access to PCG's IV&V Center of Excellence for knowledge sharing and professional development.

Proven Tools. PCG IV&V consultants use a wide array of software tools, assessment guides, and checklists to assess a project's work processes and products. At various phases of the MES IV&V project, these tools may include IV&V checklists, design and code analysis, configuration management, test automation, and testing metrics. These tools enable more efficient and accurate verification and validation of the design, code, and test documentation. Other factors in selecting suitable tools include organizational compatibility, tool effectiveness, solution constraints, costs, acquisition time, and training requirements.

Figure 1. The Eclipse IV&V® Framework

IV&V Planning. At the heart of every IV&V engagement is an Independent Verification and Validation Plan (IVVP) tailored to the project's specific requirements, expectations, and organizational environment. The IVVP is our team's project management plan. It dictates how our staff will deploy the Eclipse IV&V framework in the specific context of the MES IV&V project. The IV&V project manager will tailor our standard IVVP to the MES IV&V Project, maintaining alignment with the Project Management Book of Knowledge (PMBOK) and concepts from IEEE 1012 while incorporating project-specific requirements, project management processes, and IT standards.

The plan details the IV&V approach, procedures, checklists, tools, team structure, reporting, and communication mechanisms the IV&V team will use on the MES IV&V project. It includes an IV&V project schedule that shows dependencies and resources for all IV&V tasks. The IV&V team will align its schedule to vendor and State schedules to provide maximum value to the project. The IV&V project manager will frequently update the IVVP and IV&V project schedule throughout the project.

1.2 A Risk-Based Approach

PCG defines a finding as a statement of observation related to the project. Findings are classified as positive, preliminary concern, risk, or issue.

- A positive finding presents a statement based on a fact that supports the project. Typically, these are raised to acknowledge adherence to standards and project guidelines identified in an assessment or evaluation. For example, a project performs additional testing (outside of testing requirements) to the benefit of the project.
- A preliminary concern is an item believed may pose a risk to the project. Still, more analysis and a better understanding of the subject area is necessary before classifying the item as a formal risk or issue. Preliminary concerns are documented in statements that articulate the concern and indicate that further analysis and/or understanding of the matter is required.
- A risk is "an uncertain event or condition that, if it occurs, has a positive or negative effect on a project's objectives." PCG identifies risks with adverse effects and expands the definition to include both conditions which may occur and those which may not happen (e.g., lack of a well-defined requirements traceability process could lead to the delivery of an incomplete system, requiring costly and time-consuming rework).
- An issue is an event, often previously identified as a risk, which has occurred and caused a negative impact on the project. Issues are documented as findings that identify the event, its impact on the project, and its status toward resolution.

1.3 Meeting the Minimum Criteria

(6.1) Quarterly Reports and Templates - all items 6.1.1 - 6.1.15)

Each Quarterly IV&V Review Report will include a review period for the AHCCCS project team to provide clarification and additional context, which may be helpful in the IV&V findings. Reports will be shared with AHCCCS and any other required teams simultaneously to maintain transparency in the review process. IV&V draft reports will be submitted five (5) business days before the due date. Following the submission of draft reports, PCG will monitor the progress of the draft review and respond to comments that arise during the process. Comments will be reviewed and incorporated into the final IV&V reports as appropriate. Once all changes have been made, PCG will then redeliver a final version of each report.

Although the focus of IV&V activities changes based on the point in time that they are conducted, the Quarterly IV&V Review Reports always have the same structure. This allows our clients to become familiar with how to find the desired information in each report. PCG's IV&V reports are easy to use as reference documentation and to communicate project progress to executive stakeholders or within the project team. The PCG Quarterly IV&V Review Reports are written so that the IV&V findings are clear for all project stakeholders. Our reports are collaboration tools used for improving the project outcome. To promote collaboration, PCG ensures that nothing we report comes as a surprise to State or vendor stakeholders. The contents and presentation of the PCG reports facilitate understanding and clearly define mitigation steps to address our findings.

The Quarterly IV&V Reports will be presented to and reviewed by the AHCCCS Project Oversight Team and other relevant stakeholders as necessary. Members of the AHCCCS Oversight Team will be included in quarterly interviews. PCG will ensure the format and content areas are appropriately addressed, as previously agreed upon with the State. PCG will also update the Quarterly IV&V Reports to address inaccurate information and redistribute the updated versions as appropriate.

PCG understands the importance of ensuring that documentation related to any changes and updates is appropriately stored and reviewed. Updating the system documentation regularly is key to maintaining progress on the project and avoiding risks and issues related to the eventual operation and maintenance of the new system. PCG will provide Quarterly IV&V Review Reports on AHCCCS Project updates and documentation. PCG IV&V reports will include the status of the State's effort and the background of any pertinent historical information. PCG will perform a detailed analysis around the involvement of key stakeholders by reviewing the Stakeholder Management Plan and Communication Plan to identify the stakeholders involved in the decision-making process and are informed of the Project's progress.

PCG will conduct assessments of project activities and produce quality reports based on assessment results. All IV&V assessment and evaluation activities will align with the AHCCCS Project requirements and State IT policies, industry standards, and best practices such as IEEE, Capability Maturity Model Integrated (CMMI), and PMBOK. PCG will review the Key Performance Indicators (KPI) for the AHCCCS Project and verify that best practices and metrics are employed to identify risks, issues, project progress, and performance and provide recommendations.

The Appendix has an example of the Quarterly IV&V Review Report deliverable containing the IV&V Project Assessment Categories and a Project Health Dashboard. A table explaining the rankings is provided below the Project Health Dashboard.

(6.2) Actionable Recommendations in each area evaluation in the quarterly reports

PCG focuses on the early detection of weaknesses, risks, and issues and provides continuous feedback to the AHCCCS Project in the form of practical advice– resulting in greater opportunity for success. PCG will collaborate with AHCCCS for active and continual feedback for identified IV&V findings, allowing the AHCCCS Project team to plan mitigation and preventive actions. One reason PCG's staff is effective at maintaining cooperative collaboration with the contractors we oversee is that our IV&V team members have been for vendors and state government agencies and understand the reality

of delivering projects. They have experience dealing with the trade-offs among costs, level of effort, and practical compliance with standards while maintaining project schedules and quality. We also know that sometimes the job requires us to tell people things they don't want to hear. We deliver those messages with an understanding of the pressures the recipient is under and consideration for how our input can improve success, always preferring to provide guidance rather than criticism and recommendations rather than simply pointing out weaknesses. Eclipse IV&V's core values are designed to provide our clients with objective reviews and analysis, actionable recommendations, and serve as a foundation for a trusted partnership.

(6.3) Priority and Scoping Methodology to be used in each quarterly report

PCG will evaluate the core areas listed in Section 6.1 of the RFP and provide feedback and recommendations for each project on a flow basis. As appropriate and aligned with the project schedule, the IV&V team will provide ongoing assessments related to both the management and technical aspects of the project. PCG submits a Deliverable Expectation Document (DED) before work starts to align our approach to stakeholder expectations. We invite feedback to help us adjust our priority and scope to your needs. DEDs eliminate the need for lengthy review cycles and increase client satisfaction with our services. We encourage AHCCCS to share approved IV&V DEDs with your vendor to facilitate understanding of the IV&V project role and the criteria we use to evaluate work products.

Assessment areas will be evaluated as applicable to the current state of the project life cycle. PCG will evaluate the Project's processes and procedures for the tasks and activities and ensure they enhance the project's smooth execution and success. In accordance with the Task Order requirements, IV&V will verify that the project is managed within the baselined project constraints of cost, time, and quality while maintaining the planned quality standards. IV&V will assess all Tas Order requirement areas requested, verify the applicable project activities are sufficient, and adhere to applicable standards through periodic inspections, walkthroughs, and checks.

Scope, schedule, and budget factors are assessed as part of each quarterly IV&V review, and we will make an assessment of green, yellow, or red for each factor. This information is compiled and submitted as a part of the Quarterly IV&V Review Reports and includes recommendations or necessary action. PCG will follow up on recommendations based on priority by impact and urgency and assess the State's action on recommendations. PCG will update the recommendations based on the State's response and provide any other feedback and recommendations as necessary. PCG will maintain the log of traceable Findings and recommendations from the project initiation to closure.

(6.4) Consulting support to implement the recommendations in a timely manner.

PCG has served as a trusted advisor to some of the country's largest and most complex Medicaid and Eligibility transformation and modernization projects. This experience has helped us understand the breadth of technologies in the marketplace, the vendors who integrate modular systems, and the challenges of modernizing complex, mission-critical systems. We tailor our approach to minimize our impact and demand on staff, thoroughly vet all findings before delivering them, and prioritize findings so staff can focus on what will make the most significant impact.

PCG facilitates several mediums to allow the State's management team and the vendor to respond to any PCG findings, including mitigation strategies, status updates to project reports, and clarification for any open findings. This feedback can be gathered from informal responses to quarterly reports, comment logs for PCG's formal deliverables, or brought up in weekly IV&V status meetings. Our team will also work closely with the State and vendors to ensure that there is a comfortable relationship in setting up ad hoc meetings and reviews as needed, keeping communication lines open for fair and frequent feedback. Our early, frequent, and honest communication has allowed our team to build a strong rapport with other States and vendors we have worked with. This approach has led to many project successes as strong communications are formed, and PCG is seen as a trusted partner and advisor.

(6.5) Develop an IV&V team which includes a small core team of two (2) or three (3) key staff members who will directly work on the project.

The AHCCCS Project can be confident that a team of skilled professionals with deep experience in IV&V and Medicaid will support it. **The proposed IV&V team has a total of 78 years of Medicaid experience and 43 years of IV&V experience**. They have practical application and hands-on experience, coupled with a results-driven orientation, to bring the right experience to assist the AHCCCS project team in achieving project success. The core IV&V team consists of a project manager and two (2) IV&V Analysts, supported by an engagement manager and MES SME. All proposed team members have extensive project management, Medicaid, and IV&V experience. Section 2.3 and 2.4 includes detailed information about the team's relevant experience, background, and project roles.

(6.6) Engagement Plan for IV&V performance include the following:

6.6.1: Create a plan to engage with project teams (Agency and Supplier) to garner understanding of projects strengths and weaknesses

During engagement planning, the IV&V team will meet with AHCCCS project managers and other stakeholders to fully grasp the needs and concerns that have been identified by the Project. Following this initial planning, the IV&V team will hold a kick-off meeting with the key project stakeholders to set up communication protocols and conduct an IV&V stakeholder analysis. PCG will establish initial project controls and procedures as well as set up reporting mechanisms, become familiar with the project team on the AHCCCS side, and conduct an initial discovery period of project deliverables. This will help the IV&V team gain the appropriate context and understanding of the project, leading to the creation of a baseline perspective on strengths and weaknesses along with risks and issues facing the project. From this initial assessment, PCG will be able to monitor project progress and develop trend indicators. PCG promotes a collaborative approach to our IV&V services by focusing on key elements within our technical assessment methodology to gather and report project information. With experience working with large, multi-vendor systems, PCG has developed a methodology that allows for frequent, transparent, and consistent communication with internal and external project entities.

The IVVP (IV&V Management Plan) is a key deliverable for AHCCCS. Our IV&V team develops a project plan following the requirements outlined in the contract, PMI PMBOK, concepts from the IEEE 1012, and customer IT standards. The plan details the IV&V procedures, checklists, and other appropriate tools. The IV&V Project Schedule is also provided along with the IVVP to show timelines associated with IV&V deliverables. This detailed schedule, developed in Microsoft Project, assigns resources and timelines to all IV&V tasks. The schedule is consistently aligned with the DD&I vendor schedule to ensure the productive accomplishment of the IV&V tasks. Both the narrative IVVP and the Project Schedule and Plan are updated regularly as the project progresses.

6.6.2: For interview leading to quarterly report, describe the documents that will be reviewed and comments on in its quarterly report; and

In preparing the Quarterly IV&V Review, we will conduct the following activities:

- A schedule of review activities to be performed with the State
- A list of Project Team and Stakeholder interviews to be performed
- A list of project documentation is to be provided for PCG review
- PCG will review and analyze collected project artifacts and draft the Quarterly IV&V Review Report

PCG will review the status details of the current observations, findings, and risks recorded in the Findings Log, as well as new Findings and observations since the previous IV&V review. We will also review the project schedule activities and relevant artifacts. PCG will perform the discovery, research, and clarify processes to assess the current status and

associated gaps since the previous review. Subsequently, PCG may request a list of additional project artifacts to be reviewed and interviews and meetings to be attended or observed by PCG.

The results, including new observations, findings, and risks, will be updated in the Findings Log. These will be used to draft the respective Quarterly IV&V Review Reports, DORs, Quarterly Status Reports, and management briefings. Like the Initial IV&V Review report, PCG will deliver the Quarterly IV&V Report draft and its subsequent final updates.

A sample of the format for the Quarterly IV&V Review Report is in the Appendix.

6.6.3: Explain the approach the contractor will use to engage with the project team after the report is issued to advance the adoption of report recommendations.

Our findings, both negative and positive, will consider all stakeholders, and our recommendations will benefit the project as a whole. We will deliver our findings and recommendations in non-specialists' terms and make sure they are relevant and actionable by the project. Once a risk response is provided by AHCCCS, PCG would seek to understand AHCCCS' risk response plan or contingency plan if the risk occurs. This process consists of the following:

1. AHCCCS identifies a finding owner.
2. AHCCCS identifies the steps that will be taken to eliminate or reduce the significance of the finding.
3. AHCCCS and PCG agree on an update frequency to re-review the finding.
4. AHCCCS provides updates to the finding status at either the regularly scheduled Risk Meeting or during the quarterly IV&V report reviews.

AHCCCS is encouraged to share its questions and concerns derived during its IV&V report review, as it will help streamline the review and mitigation process by allowing PCG opportunities to provide feedback actively. Once a risk priority is established, PCG will work with AHCCCS to select and execute an appropriate response strategy: Avoid, Transfer, Mitigate or Accept.

AHCCCS will observe that our resources will deliver high-quality, effective IV&V services founded on solid industry standards. PCG uses the CMMI, PMBOK, and IEEE on all IV&V projects. The feedback and recommendations AHCCCS will receive based on these standards will advance the project by making the project easier to manage, the new system-driven processes easier to integrate, and the resulting workstreams easier to coordinate.

1.4 How PCG Will Complete the Deliverables

Explanation of the methodology and approach that will be used to complete the deliverables.

AHCCCS needs an experienced partner to objectively assess the project scope, schedule, budget, and quality and to point out potential risks to project success. PCG will utilize our proven Eclipse IV&V assessment methodology to ensure you receive a detailed, objective, and accurate assessment of processes and work products at all stages of the project life cycle.

Figure 2 describes that the assessment methodology is comprised of four (4) stages for the AHCCCS project. The Eclipse IV&V assessment methodology ensures that our team gathers the right data, from the right sources, at the right time to provide AHCCCS' leadership with the right information to inform the right decisions.

Figure 2. The Eclipse Assessment Methodology

Methodology for Completing Each Project Deliverable

The previous section provided an overview of our overall IV&V approach and methodology. This section describes in more detail, our methodology for completing each project deliverable, as listed in **Table 1** below:

Table 1. Approach and Steps to the Service Requirements

APPROACH AND STEPS
Service Requirement: **Schedule Management** Schedule Management is the process of developing and maintaining the project schedule. The project schedule is the roadmap for how the project will be executed. Schedules are an important part of any project as they provide the project team, sponsor, and stakeholders with a picture of the project's status at any given time. PCG will conduct an initial assessment of the project's schedules, analyzing vendor schedules, including any integrated schedules for the multiple AHCCCS modernization projects.

APPROACH AND STEPS

- Schedules will be reviewed to verify that adequate time and resources are assigned for planning, development, review, testing, and rework; this will include assessing project plans and resource loads to verify that the appropriate leveling of resources has been completed and dependencies are identified.
- For complex projects like this, PCG uses the Steelray Project Analyzer tool to evaluate the vendors' project schedules and identify critical path tasks at risk. The result of the Steelray analysis is a traffic light status scorecard to easily identify problem areas in the schedules, such as missing baseline data or missing assigned resources, along with complex quality errors, such as excessive slack durations, out-of-sequence tasks, or poorly formed dependencies. The Steelray Project Analyzer tool, combined with PCG's experience, provides practical and actionable insight into the project schedules.
- Lessons learned from other Medicaid modernization projects will also be applied. Project delays were attributed to many factors, but one outcome was to increase the frequency of status reviews and reports on the project schedule. PCG worked closely with the project team to identify and standardize status reports based on the project schedule, providing the much-needed mitigation while minimizing the additional effort on state staff.

Service Requirement: **Resource Management**

The Eclipse IV&V Methodology was developed with guidance for Resource Management activities based on IEEE Std 1233, IEEE Std 1362, IEEE Std 14143, and IEEE Std 830 foundational principles. This guidance is applied throughout the IVVP through approach, procedures, checklists, tools, team structure, reporting, and communication mechanisms the IV&V team will use on the MES Project solution project. It includes an IV&V project schedule that shows dependencies and resources for all IV&V tasks. The IV&V team will align its schedule to vendor and State schedules to provide maximum value to the project.

Service Requirement: **Scope and Requirements Management**

As part of our full-service IV&V engagement, our team will monitor progress against contract scope and requirements, published plans, applicable standards, and AHCCCS expectations. Project plans generally include schedules, budgets, test plans, integration plans, etc. We will review these deliverables as they are produced for quality and maintain our ongoing review throughout the project to verify work is completed as documented in the plans AHCCCS accepted.

- Review relevant documentation, including approved plans, schedules, budgets, and relevant policies or guidance
- Assess project progress or work to date against the plan in question
- Seek clarification, as needed, from key project team members to ensure agreement and concurrence on the results of the discovery, research, and analysis
- Report on deviations or exceptions as appropriate, either in weekly or monthly reports or in ad-hoc sessions as urgency or deviation dictates to ensure a commensurate response

Service Requirement: **Technical Solution Management**

As needed, the PCG IV&V team will monitor the day-to-day operations and management of each planned modular technical solution to ensure alignment of the overall certification strategy and compliance with CMS guidelines. We will rely on each modular solution team to provide access to solution documentation, systems, and staff during normal business, as required to carry out oversight activities, including:

- Observing meetings, reviewing deliverables and documentation, and attending working sessions to ensure a high level of integrity and confidence in work outputs
- Utilizing our proprietary Assessment Methodology to assess risk and the adequacy of each module and associated services for certification purposes. Further, we identify industry standards on a case-by-case basis depending on the type of assessment to be performed (e.g., use of National Institute of Security and Technology [NIST] security standards)
- Monitoring the performance of each component for each life cycle phase, focusing on ensuring CMS certification/approval. We provide example certification reporting templates for activities and tasks, leveraging our library of assessment guides and checklists customized to support certification reviews
- Performing detailed reviews of solution/project documentation associated with certification for accuracy and completeness by validating review cycles are in alignment with each solution's milestone review schedule, verifying continuously throughout each life cycle, and maximizing the benefits of early risk identification with actionable recommendations

APPROACH AND STEPS
Service Requirement: **Data Management/ Migration/ Conversion** Data Management/Migration/Conversion oversight ensures a comprehensive process has been defined for data management and migration activities needed to implement the new system successfully. The Data Conversion assessment will be used to verify the data conversion plans, process, procedures, software, and supporting tools are sufficient to meet the needs of the project. PCG's assessment will focus on the following: • Evaluating AHCCCS' existing and proposed plans, procedures, and software for data conversion • Verifying that procedures are in place and are being followed to review the converted data for completeness and accuracy and to perform data cleanup as required • Determining conversion error rates and if the error rates are manageable • Making recommendations on making the conversion process more efficient and on maintaining the integrity of data during the conversion The PCG Data Conversion Management methodology relies on the following standards: IEEE 1016, ISO/IEC/IEEE 12207, IEEE 1012
Service Requirement: **Quality Assurance, Testing, Defect Resolution** The PCG IV&V Team will be involved in the project's quality assurance, testing, and defect resolution processes to observe and provide guidance where applicable. The team may also use the project QA standards, guidelines, and processes to assess internal compliance. While the intent of the reviews will differ, the IV&V team will perform its IV&V tasks concurrently with those performed by the AHCCCS or the System Vendor quality assurance teams. The coordination of these activities will ensure minimal disruption to the overall project schedule. In reviewing products that have been reworked to resolve deficiencies, the IV&V team may also take into consideration the findings from the quality assurance team to ensure the whole product meets all requirements.
Service Requirement: **Project Governance and Communications** Adequate governance will be imperative to the success of the AHCCCS MES technical implementation, whether in the form of decision-making governance, risk and issue management, data governance, or communication cadence. In addition, the PCG Eclipse IV&V methodology includes provisions for managing challenges in stakeholder expectations and involvement and organizational change management. To support communication and the findings management process, PCG developed an Enterprise Findings Log (EFL) that aggregates the IV&V Findings Logs from all of our IV&V experience into a single, easy-to-read findings repository. The EFL promotes communication and information sharing across IV&V project teams and is a valuable resource that helps them recognize common pitfalls and gather lessons learned from similar projects. By leveraging the EFL, PCG teams can maximize the value they provide to IV&V clients.
Service Requirement: **Financial Management** A core tenet of Eclipse IV&V is maintaining the three tiers of independence (managerial, financial, and technical) as well as rooting all findings in empirical and objective information. PCG's insights and guidance focus solely on the success of the project. For Financial Management concerns, PCG expects the vendor(s) to provide DDI proposals, work plans, and project financials. These artifacts will be continually revisited throughout the project to ascertain the point-in-time financial health of the project as well as address and mitigate any adverse financial impacts to the project that may be identified.
Service Requirement: **Change Issues and Risk Management** The PCG IV&V Team will be involved in the AHCCCS and the project's change management processes to observe and provide guidance where applicable. The team will also use the results from the change management processes in its review of work products to ensure approved changes have been appropriately incorporated, and unapproved changes have not been executed. To effectively deliver Risk Management services, the PCG IV&V Team will work closely with the Management team to identify and report risks, develop mitigation strategies, and monitor risk closure. We focus on early risk detection, increasing the lead time. By employing a risk-based approach to IV&V, each project will be notified of potential risks to project scope, schedule, budget, and quality well in advance. Updates are communicated to key project stakeholders on an ongoing basis. As part of our risk management approach, we maintain findings and recommendations in our Project Findings Log. AHCCCS will see risk trends and tracking over time to identify and address issues that stem from outside the project.

APPROACH AND STEPS
• Develop risk and issue tracker • Identify and assess risks and issues • Update on risks and issues in weekly scheduled review meetings
Service Requirement: **Documentation and Deliverables Management** As an independent partner, PCG will review AHCCCS plans and artifacts as well as third-party vendor deliverables to provide insight and recommendations and identify risks that may cause unforeseen outcomes down the road in projects. PCG draws upon a repository of IV&V checklists built on IEEE standards to support the deliverable review process throughout all software development life cycle (SDLC) stages. AHCCCS will have access to quantifiable data that adds value and transparency throughout each phase of the SDLC. The deliverable assessments are configured to track the vendor response and client acceptance by including detailed comments, structured table formatting, and actionable tasks. • Submit deliverable for review • Identify relevant oversight and policy documents (e.g., Contracts, vendor Task Orders, policies, AHCCCS policies) • Draft checklist • Review the document against the checklist • Internal roast of findings
Service Requirement: **Security Management** Utilizing our proprietary Technical Assessment Methodology to assess risk and the adequacy of each module and associated services for certification purposes. Further, we identify industry standards on a case-by-case basis depending on the type of assessment to be performed (e.g., use of National Institute of Security and Technology [NIST] security standards).
Service Requirement: **Training, Go-Live, and Post Implementation** PCG's training, go-live, and post-implementation methodology includes several assessments and reviews to ensure a smooth transition to the new system and supports certification activities through that transition. These activities include: • The Training Plan Assessment is used to verify that the defined training plan supports and is traceable to and from Project requirements, the plan provides appropriate types of training, and the AHCCCS MES project delivers the planned training. PCG will perform IV&V of user training preparation, design, development, implementation, evaluation techniques, and content management. • The Training Materials Assessment will validate that training materials support the training plan and facilitate knowledge transfer to the end users. • Training Evaluation and Feedback Post Implementation: PCG will independently confirm the evaluation methods selected for the AHCCCS MES project and report findings. Evaluation of training presentation and results will be performed during learning using formative assessments and direct observation; after the learning process using summative assessments, and through follow-up questionnaires filled out by attendees directly after the training and at a period (typically 6 [six] weeks) after the user begins production use of the system. These will ascertain that the training provided sufficient knowledge transfer for using, maintaining, and operating the system. The qualitative and quantitative results of the training evaluation will be presented with the IV&V deliverables. PCG will consult with the stakeholders to identify opportunities for improvement in the AHCCCS training, including content, style, format, and facilities. • Certification training for state staff will provide an understanding of expectations, including the role of IV&V, the process for completing the Quarterly IV&V Progress Reports, and preparing for Milestone Reviews with CMS.

2 Experience and Expertise

2.1 Experience: IV&V, State Medicaid Technology Projects, Similar Projects

PCG has been engaged by many government agencies on projects of similar size and scope to the AHCCCS MES technical implementation, where we utilized our proven IV&V methodology to support the success of those endeavors. In the past five (5) years alone, PCG has provided IV&V services to 43 agencies in 24 states and territories.

2.2 Knowledge and Experience

PCG has helped numerous public sector organizations modify and build new IT solutions to meet increasing program demands, improve business processes, maintain reliable data, assist with federal and state compliance, and improve client outcomes. Additionally, as the government IT landscape continues to evolve, embracing agile development and technologies cloud technologies, so too have our expertise, tools, and skillsets evolved. PCG has supported our clients with IV&V services for large-scale, public sector, enterprise-level business transformation projects that are comparable to the effort that will be required to support any IV&V project.

Figure 3. Recent IV&V Experience

PCG is singularly qualified to provide IV&V services to AHCCCS based on our recent and ongoing project experience. Below are 17 projects where we currently perform or have successfully completed IV&V services and deliverables on MES or Medicaid-related projects within the last five (5) years. In the past five years, PCG has provided IV&V services to 24 states and territories, as highlighted in the map on the right.

Table 2. Recent Medicaid IV&V Engagements

Client	Project
Alabama Medicaid Agency	Eligibility and Enrollment
Alaska Department of Health & Social Services	Multiple Medicaid Enterprise Systems projects
California Department of Technology Services & Department of Health Care Services	Department of Health Care Services Modular Projects
Delaware Department of Health and Social Services	Delaware Medicaid Enterprise System IV&V
Hawaii Department of Human Services	Benefits Eligibility System (BES)
Iowa Department of Human Services	Eligibility Integrated Application Solution (ELIAS)
Louisiana Department of Health	Multiple Medicaid Enterprise System projects
Michigan Public Health Institute	MMIS Cloud Infrastructure
Minnesota Department of Information Technology Services	Modular MMIS modernization
Mississippi Division of Medicaid	Multiple Medicaid Enterprise System projects
North Carolina Department of Health and Human Services	North Carolina Families Accessing Services through Technology (NC FAST) Program
North Carolina Department of Health and Human Services	Multiple Medicaid Enterprise System (MES) projects

CLIENT	PROJECT
South Dakota Department of Social Services	Benefits Eligibility and Enrollment System (BEES)
Virgin Islands Department of Human Services	VIBES Integrated Eligibility and Enrollment (IE&E) System
Washington State Department of Social and Health Services	Automated Client Eligibility System (ACES) Remediation
Washington State Department of Social and Health Services	Security Infrastructure Modernization (DSIM)
Wisconsin Department of Health	Eligibility and Enrollment

2.3 PROJECT TEAM EXPERIENCE

Table 3. Recent Medicaid IV&V Engagements

Team Member	Core Team Experience & Project Role
Chris Clausen **Project Manager, PMP, Professional Eclipse IV&V Certification**	Chris Clausen is a PMP-certified Project Manager with 30+ years of experience in project management, data processing, systems integration, and IV&V. Chris has 22 years of Medicaid experience and recently provided oversight to Medicaid clients leading project teams through the latest CMS certification processes. He served as a systems integration project manager for the California Medicaid Management Information System, the Oklahoma Eligibility and Enrollment System, and the Mississippi MMIS DDI project. In these roles, he supported the development, implementation, and maintenance of MES. He directed and managed resources to accomplish project objectives on time and within budget. Throughout his career, Chris has continually provided direct client interface and ensured service delivery excellence. As a technology consultant, Chris focuses on making sure that federal and state requirements are met and appropriate processes are followed so that federally funded systems satisfy their intended business purpose. ***Role:*** Chris will oversee and manage the project schedule as the IV&V project manager and primary point of contact for AHCCCS. He will ensure quality deliverables and reporting to the project and leadership teams and hold the IV&V team accountable for the assigned roles and responsibilities and expected work outputs.
Ann Wiebers **IV&V Analyst**	Ann Wiebers is a senior consultant with 21 years of Medicaid experience and six years of experience providing IV&V services to government agencies. Ann's professional experience includes IV&V analysis, Medicaid systems functionality expertise, assisting with Streamlined Modular Certification (SMC), Medicaid Eligibility and Enrollment Toolkit (MEET), Medicaid Enterprise Certification Toolkit (MECT), Centers for Medicare and Medicaid Services (CMS) Seven Standards and Conditions, CMS federal data services HUB (FDSH) attestation, strategic and organizational planning. Ann also has significant state experience with the Affordable Care Act (ACA), Medicaid eligibility, SNAP, and TANF federal regulations. ***Role:*** Ann will be responsible for assessing project performance, reviewing project deliverables, and supporting the quarterly reviews and reporting as an IV&V Analyst.
Kelli Conine **IV&V Analyst**	Kelli Conine is a Senior Analyst at PCG with over 27 years of experience in information technology. Kelli specializes in state government social services and providing IV&V services. Kelli's career highlights include support of Texas and Wisconsin Health and Human Service's Medicaid and Women, Infant, and Children's (WIC) programs, highlighting the subject matter of eligibility and claim processing. Kelli translated this experience to the private sector, working with insurance companies such as Cigna and QBE. Kelli's strength in the workplace is her attention to detail, positive approach to tasks, and tireless energy to support project teams and ensure project success. ***Role:*** Kelli will be responsible for assessing project performance, reviewing project deliverables, and supporting the quarterly reviews and reporting as an IV&V Analyst.

2.4 Key Staff Resumes and References

Resumes and references for the proposed core IV&V team begin on the next page to highlight their relevant experience in the last five (5) years. In addition to the core team, resumes have been provided for the Engagement Manager, Technical SME, and MES SME.

- Chris Clausen, Project Manager, PMP, Professional Eclipse IV&V Certification
- Ann Wiebers, IV&V Analyst
- Kelli Conine, IV&V Analyst
- Rhonda Brinkoeter, Engagement Manager
- John Grieco, Technical Subject Matter Expert
- Sibyl Govan, Medicaid Enterprise System Subject Matter Expert

Chris Clausen, PMP, Project Manager

PROFESSIONAL BIOGRAPHY

Chris is a Consultant with PCG who has earned his Eclipse IV&V® certification at the Professional Level and is PMP certified. He brings thirty-plus years of experience in project management, data processing, systems integration, and IV&V. Chris currently provides CMS oversight to Medicaid clients leading project teams through the latest CMS certification processes. Before coming to PCG, he served as a systems integration project manager for the California Medicaid Management Information System, the Oklahoma Eligibility and Enrollment System, and the Mississippi MMIS DDI project. In these roles, he supported the development, implementation, and maintenance of Medicaid Enterprise Systems. Directed and managed resources to accomplish project objectives on time and within budget. Throughout his career, Chris has continually provided direct client interface and ensured service delivery excellence. As a technology consultant, Chris focuses on making sure that federal and state requirements are met and appropriate processes are followed so that federally funded systems satisfy their intended business purpose.

RELEVANT PROJECT EXPERIENCE

California Department of Health Care Services

Certification & Oversight Services

Consultant | November 2021 – Present

Provides guidance and oversight in support of multiple Medicaid modules in their pursuit of CMS certification. These tasks involve deciphering the new Objective Based Certification/Streamlined Modular Certification methodology proposed by CMS and applying it to in-progress and newly initiated technology projects. Chris also delivers tasks in support of the day-to-day operations and management of modular MES projects for the California Department of Health Care Services (DHCS). His responsibilities on the Certification Oversight and Support Project include oversight and assessment activities as well as SDLC performance metrics/measurements, MITA framework compliance, Streamlined Modular Certification (SMC), and Outcomes-Based Certification (OBC) activities. Chris also provides reporting and communications for multiple projects and leads certification project teams to achieve CMS certification.

California Office of Systems Integration

Medicaid Enterprise Certification Lifecycle (MECL) IV&V Services

Consultant | September 2019 – October 2021

Supported the California Department of Health Care Services (DHCS) CMS Certification Project, providing independent IV&V services, guidance, and certification support to aid DHCS in CMS certification of their Medicaid projects. Chris assisted projects in achieving compliance with standards and conditions for the engagement, including the verification, validation, and development of recommendations throughout the software development life cycle (SDLC) efforts (including organizational change management) to increase performance, alignment, and enhanced organizational capacity for downstream initiatives. This included substantiating the development, management, implementation, and evaluation of plans, processes, procedures, and performance interventions for enterprise applications and legacy systems and opportunities to identify, qualify, and bridge mutual interests among project staff and vendors for future opportunities and ROI.

Mississippi Division of Medicaid

Medicaid Replacement Project

Project Management Office Lead | November 2017 – September 2019

Supported the Mississippi MES DDI project with the implementation of a new Medicaid Management Information System. Responsible for formal deliverables regarding the project management approach used to manage the project, as well as configuring tools the project team used for governance activities, traceability, reporting, and project document management. Led efforts to document project governance plans, including developing plans for Requirements Management, Change Management, Risk & Issue Management, and Schedule Management. This effort included reviewing and understanding the RFP, Proposal, Statement of Work, and various amendments. Managed the DXC PMO team for the MS MES DDI, overseeing the direct work of the project scheduler, tech writers, and project analyst. Managed the configuration of the project work tool (rTrace) for MS-specific changes that promote project collaboration, including visibility into workstreams (work items), test cases, release information, issues, risks, and change requests without having to integrate across multiple data sources.

EDUCATION

- Bachelor of Business Administration, Management Information Systems | Ohio University – Athens, OH

CERTIFICATIONS

- Project Management Professional (PMP), 2004 | Project Management Institute | #199821
- Eclipse IV&V® Professional

REFERENCES

Chris Kutzer, DXC Technology
Mississippi Medicaid Replacement Project, DXC Technology (now Gainwell)
(508) 614-0065
chris.kutzer@gmail.com

Carma Dunsmore, PMO Manager
DXC Technology, Oklahoma Medicaid Management Information System, DXC Technology (now Gainwell)
(916) 715-2605
carma.dunsmore@gainwell.com

Ann Wiebers, IV&V Analyst

PROFESSIONAL BIOGRAPHY

Ann Wiebers is a senior consultant with 21 years of Medicaid experience and six years of experience providing IV&V services to government agencies. Ann's professional experience includes IV&V analysis, Medicaid systems functionality expertise, assisting with Streamlined Modular Certification (SMC), Medicaid Eligibility and Enrollment Toolkit (MEET), Medicaid Enterprise Certification Toolkit (MECT), Centers for Medicare and Medicaid Services (CMS) Seven Standards and Conditions, CMS federal data services HUB (FDSH) attestation, strategic and organizational planning. Ann also has significant state experience with the Affordable Care Act (ACA), Medicaid eligibility, SNAP, and TANF federal regulations.

RELEVANT PROJECT EXPERIENCE

Arizona Department of Economic Security (ADES)

ATLAS Replacement Project, Independent Verification and Validation (IV&V) Services
IV&V Analyst | September 2022 – Present

The Arizona Department of Economic Security (AZ DES) is replacing its 20+year legacy mainframe-based system, Arizona Tracking and Location Automated System (ATLAS), which is the core system for managing and processing approximately 300,000 active child support cases in Arizona, including the Navajo Nation. The IV&V is responsible for delivering independent verification and validation services for the project, identifying risks to the success of the organization and/or the project, and recommending strategies to mitigate those risks. Ann is responsible for activities required to verify and validate functional and business requirements including:

- Evaluating program artifacts and deliverables for adherence to industry standards and best practices
- Conducting risk assessments to identify risks and mitigations
- Evaluating vendor functional deliverable quality, contract compliance, and Office of Child Support Enforcement (OCSE) system certification requirements

Iowa Department of Human Services

Eligibility Integrated Application Solution (ELIAS) IV&V Project
IV&V Analyst | August 2017 – September 2018; November 2018 – August 2022

The ELIAS project was a blended Agile and Waterfall development upgrade to Iowa's Medicaid eligibility system. Ann provided IV&V services following the Centers for Medicare and Medicaid Services (CMS) Medicaid Eligibility and Enrollment Lifecycle (MEELC). Ann's responsibilities include the assessment and completion of Medicaid Eligibility and Enrollment Toolkit (MEET) checklists, IV&V periodic (quarterly) progress reports, and assisting Iowa with Streamlined Modular Certification (SMC). Ann provided a bi-weekly assessment of ELIAS sprint outcomes and was also responsible for the following:

- Project management of IV&V services
- Identification and tracking of findings, risks, and issues through to mitigation
- Coordinating attestation efforts with DHS and other stakeholders as necessary to obtain the CMS Authority to Connect (ATC) for select hub services
- Participating in management and planning meetings and regularly reports on IV&V status to DHS stakeholders

Iowa Department of Human Services

Iowa Medicaid Enterprise (IME) Program Integrity System Certification Project

IV&V Analyst/Project Manager | April 2019 – September 2020

The IME Program Integrity Certification Project was a non-traditional Medicaid system certification project. The system was procured via an emergency contract. The selected vendor provided the data analytics system and subcontracted the case management system. The systems were deployed a year apart (2017 and 2018), and IV&V was brought on board after the final release.

Ann was the lead IV&V analyst for the certification project and acted as project manager. Ann completed the non-technical portions of the MECL IV&V Progress report and its corresponding Programmatic checklist, along with the Program Integrity and five (5) core checklists. Ann provided oversight of the overall IV&V effort and guidance to the IV&V Security and Privacy/Technical analyst.

CERTIFICATIONS

- Eclipse IV&V® Professional

REFERENCES

Rachel Danley, Iowa Department of Human Services
Iowa Medicaid Enterprise (IME) Program Integrity System Certification Project
(641) 521-5378
rdanley@dhs.state.ia.us

Tammy Fogle, Arizona Department of Economic Security
Arizona Case Record System (AZCARES) IV&V
(602) 525-0481
tfogle@azdes.com

Kelli Conine, IV&V Analyst

PROFESSIONAL BIOGRAPHY

Kelli Conine is a Senior Analyst at PCG with over 27 years of experience in information technology. Kelli specializes in state government social services and providing IV&V services. Kelli's career highlights include support of Texas and Wisconsin Health and Human Service's Medicaid and Women Infant and Children's programs, highlighting the subject matter of eligibility and claim processing. Kelli translated this experience to the private sector, working with insurance companies such as Cigna and QBE. A constant asset, Kelli's strength in the workplace is her attention to detail, positive approach to tasks, and tireless energy to support project teams and ensure project success.

RELEVANT PROJECT EXPERIENCE

Mississippi Division of Medicaid and Mississippi Department of Human Services
Health and Human Services Transformation Project (HHSTP)
Subject Matter Expert | December 2022 - Present

The HHSTP is a joint effort between the Mississippi Division of Medicaid (DOM) and the Mississippi Department of Human Services (MDHS), which includes the design, development, and implementation of the Common Web Portal (CWP), Data Hub Module (ESB), Fraud and Abuse project (FAM), and Master Person Index (MPI). Phase 1 of the project, the CWP, was implemented in December 2018 and allows the user to access one portal to apply for Medicaid, SNAP, TANF, and LIHEAP (energy assistance) through a common application. Phases 2 and 3 will be implemented in 2021/2022 and will include the Data Hub Model, FAM, and MPI.

Information from the common application is distributed to each agency's eligibility systems for processing. Vendors include Conduent (New Meds), NIC (CWP), DXC (ESB), Sotheon (FAM), and MAVERICS (In-house MDHS system). The MPI vendor is currently under selection review.

The State of Mississippi, Department of Information Technology Services (ITS), as an agent for the Division of Medicaid, has contracted with Public Consulting Group (PCG) to provide Enterprise Independent Verification & Validation (IV&V) services for Medicaid and related projects, including the Health and Human Services Transformation Project. Responsibility for IV&V services was transferred from SLI Government Solutions, LLC to PCG, effective July 1, 2020.

Kelli's responsibilities included:

- Providing subject matter guidance in the development of project requirements
- Providing IV&V review of vendor deliverables
- Providing IV&V review of project requirements
- Aiding in the creation and execution of User Acceptance Test Cases
- Providing support for User Acceptance Testing (UAT) prior to the implementation of each phase
- Participating in all project meetings
- Identifying project risks and issues

Commonwealth of Kentucky

Medicaid Enterprise Management Solution (MEMS)

Project Manager | May 2022 – December 2022

In this role, Kelli was responsible for providing deliverables, identifying risks, and providing recommendation strategies to the Commonwealth of Kentucky. She supplied project management and technical expertise for the project and provided oversight and support to project managers in the development and maintenance of integrated projects schedules. She also performed analysis and provided findings and mitigation strategies to both project and executive staff and collected and integrated scheduling inputs from multiple sources.

Louisiana Department of Health (LDH)

Medicaid Enterprise System (MES) and Eligibility and Enrollment (E&E) Independent Verification & Validation (IV&V) Project

Project Manager | May 2022 – September 2022

Kelli aided with the eligibility and enrollment (E&E) and Medicaid Enterprise System (MES) IV&V project for Louisiana Medicaid. Kelli also created plans and workflows, reviewed documents, and verified contractor compliance with contract and CMS requirements.

State of Mississippi, Division of Medicaid

eLTSS-System Project

Project Manager | September 2021 – September 2022

Kelli assisted the Mississippi Division of Medicaid as a consultant on the eLTSS-System project. Her responsibilities included:

- Participating in MS DOM certification activities
- Participating in eLTSS-System project-related meetings
- Participating in status reporting activities
- Reviewing project artifacts as required

State of Mississippi, Division of Medicaid

HITECH MMIS Transition Project

Project Manager | September 2021 – September 2022

Kelli assisted the Mississippi Division of Medicaid as a consultant on the HITECH MMIS Transition project. Her responsibilities included:

- Understanding the HITECH system and its related activities and artifacts
- Conducting an IV&V assessment of HITECH activities:
    - Participating in reviews of the RFP, SMHP, and other documents
    - Identifying CMS certification activities
    - Supporting MS DOM in certification activities

SymphonyCare

Multiple Projects

Senior Healthcare Business Analyst | March 2020 – September 2021

Kelli was responsible for underwriting, preparing reports, performing healthcare data analysis and data validation, requirements gathering, writing functional specifications, and performing workflow analysis. She acted as a liaison between the customer and technical teams and provided project management support as needed. Kelli also developed test plans and test scripts and provided analytical expertise to support data quality improvement efforts. Some of the tools, processes, and procedures she used included Confluence, Tableau, Jira, SQL scripting, Agile, Scrum, SharePoint, and the Software Development Life Cycle (SDLC).

QBE, via Smart Solutions

Multiple Projects

Senior Infrastructure Analyst / Technical Business Analyst | June 2019 – December 2019

In this role, Kelli worked with the North American (NA) Infrastructure Project Team to support process documentation and project implementation of both functional and technical solutions by collaborating with key stakeholders to gather infrastructure requirements and support organizational growth. She partnered with project managers, architecture, and technical leads to develop implementation and improvement plans by eliciting technical infrastructure requirements from key stakeholders and facilitated the translation of infrastructure needs into actionable processes. She assessed, documented, and communicated the impacts of various changes to the appropriate key partners by analyzing information needs and functional requirements, accurately defining costs and schedule timelines, and evaluated interdependencies in order to develop requirements documentation. Her responsibilities also included, but were not limited to:

- Identifying and implementing continuous improvement initiatives by assessing the alignment of current processes, programs, and systems to requirements
- Supporting end users by employing a disciplined and systematic approach in order to ensure a thorough understanding of user requirements, and user experience, and developing and making available relevant and accurate process documentation
- Using a variety of tools, processes, and procedures, including the IBM Licensing Tool, SCCM, Telephony Infrastructure, Power BI, Jira, PowerPivot, SQL scripting, ServiceNow, SharePoint, and SDLC Project

DXC Technology, via TEKsystems

Wisconsin Health and Human Services Design, Delivery, and Implementation (DD&I) Project

Senior Business Analyst | October 2018 – May 2019

Kelli was generally responsible for partnering and collaborating with clients and stakeholders in order to research and elicit, analyze, validate, and document business requirements for Wisconsin HHS' DD&I project. She applied industry and information technology expertise to support proposals, feasibility studies, implementations, and new business development. Her primary responsibility was to mentor new business analysts (BA), perform risk assessments, conduct joint review meetings, and process definition and design. Over the lifetime of the project, her team produced 17 Project Charters and five Requirement Verification deliverables. Kelli also provided direction to Project Managers to better estimate resources and project plans and worked directly with Senior Principles and Account Managers to coordinate the direction of over 100 Bas who were actively engaged in project activities. Tools, processes, and procedures used during the lifetime of the project included SQL programming, Tableau, PowerPivot, Power BI, SQL Server Integration Services (SSIS), and SQL Server Reporting Services (SSRS).

EDUCATION

- MS, Information Systems | Tarleton State University – Stephenville, TX
- BA, History, English & Psychology | Texas Tech University – Lubbock, TX

CERTIFICATIONS

- Project Management Professional (PMP), 2021 | Project Management Institute | Pending
- Eclipse IV&V® Professional

REFERENCES

Tom Costa, Mississippi Department of Human Services
Health and Human Services Transformation Project (HHSTP)
(240) 277-2655
Thomas.Costa@mdhs.ms.gov

Shannon Duplessis, Louisiana Department of Health
Medicaid Enterprise System (MES) and Eligibility and Enrollment (E&E) Independent Verification & Validation (IV&V) Project
(225) 342-9767
shannon.duplessis@la.gov

Rhonda Brinkoeter, Engagement Manager

PROFESSIONAL BIOGRAPHY

Rhonda is a health and human services management consulting professional, advising state government agencies through complex modernization efforts. She has enjoyed helping clients navigate challenges for more than 24 years. Her experience ranges from the oversight, management, and implementation of large, complex Medicaid management information systems to correctional management systems. She has assisted state government agencies in developing healthcare IT strategies, procurements, and completing projects. She thrives when bringing people and ideas together to identify solutions and drive projects forward. Rhonda has extensive experience in IV&V, Project Management, Medicaid Enterprise Systems, WIC, SNAP, TANF, and Corrections. She is a Certified Scrum Master (CSM) and Project Management Professional (PMP).

RELEVANT PROJECT EXPERIENCE

Hawaii Department of Labor and Industrial Relations
Disability Compensation Division (DCD) Electronic Case Management System (eCMS) Project IV&V
Project Manager | August 2022 – Present

The Hawaii Department of Labor and Industrial Relations (DLIR) is implementing an eCMS that incorporates Workers' Compensation (WC), Temporary Disability Insurance (TDI), Prepaid Health Care (PHC), and Professional Employer Organization (PEO) programs. External Stakeholders will be able to create an account, log in, process claims, petition for a hearing, and receive case updates. Rhonda is responsible for:

- Conducting risk assessments to identify risks and mitigations
- Assessing project methodologies, planning, and execution
- Evaluating vendor deliverable quality and contract compliance
- Providing monthly status reporting

Arizona Department of Administration
Arizona Financial Information System (AFIS) Upgrade Project IV&V
Project Manager | June 2022 – Present

Rhonda is managing a team providing IV&V services for the upgrade of their AFIS. The objective of this project is to upgrade their existing financial system to a system that provides an enhanced user experience and a configurable system.

- Conducting risk assessments to identify risks and mitigations
- Assessing project methodologies, planning, and execution
- Evaluating vendor deliverable quality and contract compliance
- Providing quarterly status reporting

Hawaii Department of Labor and Industrial Relations
Unemployment Insurance Modernization Project (HUI Mod) IV&V
Project Manager | November 2021 – Present

Rhonda is managing a team providing IV&V services for the design, development, and implementation of the Data Station Project. The Hawaii Department of Labor and Industrial Relations (DLIR) is modernizing its Unemployment Insurance (UI) systems through the Data Station Project. The objective of this project is to replace Hawaii's legacy UI systems with a new, modern UI system, in compliance with the United States Department of Labor standards.

- Conducting risk assessments to identify risks and mitigations
- Assessing project methodologies, planning, and execution
- Evaluating vendor deliverable quality and contract compliance
- Providing monthly status reporting

Arizona Department of Economic Security

Arizona Case Record System (AZCARES) IV&V

Project Manager | October 2021 – Present

Rhonda is managing a team providing IV&V services for the design, development, and implementation of AZCARES. The AZCARES project is an initiative to replace the Arizona Tracking and Locate Automated System (ATLAS), a legacy Child Support Enforcement (CSE) system. The objective of this project is to replace Arizona's legacy CSE system with a new, modern CSE system in compliance with the Office of Child Support Enforcement standards.

- Assessing overall project health, application of Maryland's SDLC methodology, and technical feasibility of the solution
- Evaluating program artifacts and deliverables for adherence to best practices
- Conducting risk assessments to identify risks and mitigations
- Assessing project methodologies, planning, and execution
- Evaluating vendor deliverable quality and contract compliance
- Providing monthly status reporting
- Providing quarterly status reporting to OCSE

Maryland Department of Information Technology

Maryland Medicaid Management Information Systems (MMIS) Modular Transformation (MMT) IV&V and Certification Support

Project Manager | June 2020 – September 2021

Rhonda managed a team providing IV&V services for the design, development, and implementation of the MMT project. The MMT project is a multi-phase, multi-year initiative that included implementing several federally required Medicaid Management Information System (MMIS) initiatives along with improvements to the current MMIS business operations service levels. The objective of this project is to develop and execute a plan for replacing Maryland's legacy MMIS system with a new, modern MMIS based on a modular implementation approach in compliance with Medicaid Infrastructure Technology Architecture (MITA) 3.0 standards, as required by the Centers for Medicare & Medicaid Services (CMS).

- Assessed overall project health, application of Maryland's SDLC methodology, and technical feasibility of the solution
- Evaluated program artifacts for adherence to best practices
- Conducted risk assessments to identify risks and mitigations
- Assessed project methodologies, planning, and execution
- Evaluated vendor deliverable quality and contract compliance
- Provided monthly status reporting
- Provided certification support
- Provided quarterly status reporting to CMS

Minnesota Department of Human Services IT Services

Minnesota Medicaid Management Information Systems (MMIS) Modernization IV&V and Certification Support
Project Manager | October 2017 – July 2020

Rhonda managed a team providing IV&V services to the Minnesota DHS for their MMIS Modernization project. She also provided certification services, following the MECT 2.3 Toolkit guidance established by the Center for Medicare and Medicaid Services (CMS)

- Assessed overall project health
- Evaluated program artifacts for adherence to best practices
- Conducted risk assessments to identify risks and mitigations
- Assessed project methodologies, planning, and execution
- Evaluated vendor deliverable quality and contract compliance
- Provided monthly status reporting
- Provided certification support
- Provided quarterly status reporting to CMS

Montana State Information Technology Services Division (SITSD)

Montana Program for Automating and Transforming Healthcare (MPATH) IV&V
Senior Advisor | January 2017 – March 2021

Montana conducted a modular replacement of their MMIS, which resulted in nine vendors implementing integrated modules. Each vendor and module project required a range of IV&V activities, including federal certification. Rhonda was a senior advisor to a team providing IV&V services to the Montana MPATH team on their MMIS Modernization effort.

- Assessed project methodologies, planning, and execution
- Evaluated quality and compliance of vendor deliverables
- Developed and implemented project-specific monitoring procedures in the areas of project schedule, scope, quality

Colorado Parks and Wildlife (CPW) Division of Natural Resources (DNR)

Colorado DNR Integrated Records Access and Management (RAMS) IV&V
Senior Advisor | January 2020 – December 2020

CPW undertook a project to replace an antiquated MS Access database with a web-based records management system that could also be accessed via mobile devices. Rhonda was a senior advisor to a team providing IV&V services.

- Conducted risk assessments
- Assessed project methodologies, planning, and execution
- Identified risks and mitigations
- Evaluated vendor deliverable quality and contract compliance
- Provided monthly status reporting

Colorado Department of Human Services (CDHS) Office of Community Access and Independence, Division of Regional Center Operations (DRCO)

Colorado DRCO EHR IV&V
Senior Advisor | January 2020 – June 2020

For this project, Rhonda:

- Conducted risk assessments
- Assessed project methodologies, planning, and execution
- Identified risks and mitigations
- Evaluated vendor deliverable quality and contract compliance
- Provided monthly status reporting

Colorado Parks and Wildlife (CPW) Division of Natural Resources (DNR)

Colorado DNR Integrated Parks and Wildlife System (IPAWS) IV&V
Senior Advisor | April 2019 – June 2020

Provided IV&V services to implement a fully-integrated Parks and Wildlife system. This project moved all licensing, permitting, and reservation functions of Colorado Parks and Wildlife into one integrated system.

- Conducted risk assessments
- Assessed project methodologies, planning, and execution
- Identified risks and mitigations
- Evaluated vendor deliverable quality and contract compliance
- Provided monthly status reporting

Colorado Division of Youth Services (DYS)

Colorado DYS Electronic Health Record (EHR) IV&V
Project Manager | March 2017 – March 2019

The Colorado Division of Youth Services engaged in a project to replace a paper records system with an electronic health record. Rhonda managed a team providing IV&V services for the project.

- Conducted risk assessments
- Assessed project methodologies, planning, and execution
- Identified risks and mitigations
- Evaluated vendor deliverable quality and contract compliance
- Provided monthly status reporting

EDUCATION

- BA, Accounting | Texas Lutheran University – Seguin, TX

CERTIFICATIONS

- Project Management Professional (PMP), 2005 | PMI | 314750
- Certified Scrum Master (CSM), 2013 | Scrum Alliance | 000289678
- Eclipse IV&V® Professional

John Grieco, Technical Subject Matter Expert

PROFESSIONAL BIOGRAPHY

John is an MBA graduate with eight years of public sector IT and business analyst experience, experienced in all facets of a technology project from requirements gathering to development, testing, and implementation. John speaks both technology and business languages and brings expert communication and critical thinking skills to the project as well as the ability to identify risks and issues early in the project's lifecycle to promote the project's success. As an IV&V consultant for one of the largest Financial Management system implementations in the country, John gained valuable experience with ServiceNow and its various modules for customer support, IT service management (ITSM), and operations. ServiceNow proved to be a powerful tool for streamlining and enhancing the system's overall efficiency. He provided significant value by ensuring all the organization's requirements were seamlessly implemented in the ServiceNow modules and ensuring a smooth transition and user adoption, and that best practices were followed. He addressed unique challenges by aligning the ServiceNow implementation with the specific requirements of the financial management domain.

RELEVANT PROJECT EXPERIENCE

Washington State Department of Social and Health Services (DSHS)

Integrated Eligibility and Enrollment (IE&E) Modernization Program (Azure Platform and E&E Status Tracker Implementation)

Technical Lead | February 2022 – Current

Providing technical lead advisory services for the incremental modernization of Washington's legacy Medicaid Eligibility and Enrollment system. Services include:

- Supervise the day-to-day efforts of a team of up to 10 Azure engineers using agile methodology
- Manage the technical delivery of cloud services that span storage, networking, and compute cloud capabilities, with a deep understanding of each service across the full IT cycle
- Ensure delivery meets client, DoD, and other state and federal requirements
- Take end-user requests for new cloud applications and make recommendations on services to use for optimal performance and scale, as well as provision, ensure capacity, monitor, and adjust as appropriate
- Convert the technical requirements of a project into the architecture and design that will guide the final product
- Bridge the gaps between complex business problems and solutions in the cloud while working with other members of the technology team, including DevOps engineers and developers, to ensure that the right technology or technologies are being built
- Instruct client on Azure Virtual Machines, Storage, Virtual Networking, Inter-site Connectivity, Monitoring, Data Protection, Network Traffic Management, Azure Active Directory, Security Identities, Governance & Compliance, and Data Services, among others
- Navigate across various customers with a trusted advisor/consultative approach and establish credibility quickly with senior-level executives across the customer organization
- Communicate project information through presentations, technical reports, or white papers

Washington Consolidated Technology Services (CTS)

WA State Cybersecurity Audit Assessment and Standard Revisions
Security Risk Analyst | January 2022 – October 2022

Conducted an independent security assessment of the state agency information technology (IT) security program audits completed by Washington state agencies since July 1, 2015 to determine the effectiveness of previous audits conducted in Washington state relative to industry standards at the time the audits were performed. Additionally, PCG evaluated the performance of agencies in acting upon audit findings and implementing recommendations. The output of this project included a report that provided the results of our assessment, including specific recommendations to improve state policies and standards relative to state cybersecurity audits to increase their value to the state.

Los Angeles Homeless Services Authority (LAHSA)

IT and Data Management Maturity Assessment
Project Lead | January 2021 – July 2021

John led a team of six consultants in conducting an enterprise-wide IT/Data Management Maturity Assessment to help leadership understand their current IT/Data management practices, the business process they support, and a path toward executing recommendations.

California State FI$Cal (Statewide Financial Information System)

Statewide Financial Information System
Project Manager | June 2021 – January 2023
IV&V Technical Lead | June 2020 – June 2021

John was part of a team providing technical consulting, implementation services, and project oversight to the California FI$Cal financial management system to support the successful implementation of statewide financial reporting. His primary responsibilities included contributions to the Development, Quality Management, and/or testing of new ledgers and extract processes to support statewide financial reporting. Additionally, he led and aligned technical discussions to identified risks and issues, represented the technology perspective of the risks and issues on an executive leadership level, ensured the overall application architecture represented business needs, and provided coaching to team members. John was responsible for the technical deliverables of the team.

Hawaii Department of Human Services (DHS)

Benefits Eligibility System
IV&V Analyst | June 2020 – Present

John is an IV&V technical analyst supporting the Hawaii DHS Systems Modernization project. On this project, PCG is responsible for ensuring best practices are followed in all areas of project management, security & privacy policies, data management, software development life cycle (SDLC) management, software development, risk management, configuration & change management, disaster recovery, requirement traceability, testing, training, documentation, and transition planning.

Washington Health Care Authority

Enterprise Data Warehouse Implementation
Data Engineer & Visualization Specialist | November 2018 – June 2020

John was the Amazon Web Services (AWS) data engineer providing technical consulting and implementation services to move the Health Care Authority (HCA) EDW to a cloud environment. His primary responsibilities included:

- Provided development, security, and operations (DevSecOps)
- Data pipeline architecture

- Orchestrated extract, transformation, and load (ETL) processes
- Supported data transformation, structures, and metadata
- Provided expert-level Tableau development and data visualization recommendation

Washington State Employment Security Department

Paid Family Medical Leave Program

Quality Assurance & Agile Coach | March 2018 – Present

John provides quality assurance (QA) reviews for the State Employment Security Department (WSESD) based on the Washington Technology (WaTech) Office of the Chief Information Officer (OCIO) QA Policy as well as industry standards and best practices as defined by the Project Management Book of Knowledge (PMBOK)® and Institute of Electrical and Electronic Engineers (IEEE)® standards. He also serves as an onsite agile coach, offering ongoing feedback on how the daily agile ceremonies can be more efficient and effective. John's primary responsibilities include:

- Review all project management deliverables and associated work efforts to validate processes and deliverables meet stated standards
- Validate that procedures are appropriate and effectively implemented
- Provided the initial project readiness assessment report
- Prepare bi-weekly QA status reports, tracking the project's progress against the initial project readiness assessment report, including:
  - QA-findings log, documenting all QA observations
  - QA-identified risks and issues
- Monitor and update the findings log and help develop the mitigation and resolution strategies
- Participate in project steering committee meetings
- Conduct regular check-in meetings with the project managers

Washington Department of Social and Health Services

Eligibility Services & Automated Client Eligibility System Remediation (ESAR)

IV&V Analyst | March 2018 – Present

John provides independent verification and validation (IV&V) support for the data reduction and re-hosting efforts for eligibility services within the state's Department of Social and Health Services (DSHS). John's role includes monthly and quarterly risks and issues reporting and ensuring that the project reporting complies with the Centers for Medicare & Medicaid Services (CMS) Medicaid Enrollment and Eligibility Toolkit (MEET) requirements. John provides IV&V support for the department's Business Information Technology Transformation (BITT) Project's current request for proposal efforts by attending multiple requirements sessions and providing guidance and support for process improvement.

Washington Office of Chief Information Officer (OCIO)

IT Portfolio Management

Research Analyst & Model Development | April 2018 – August 2018

John provided research analyst support to the OCIO IT Portfolio Management project in determining their current Portfolio Management maturity level. John's role included developing an As-Is process flow model of the current portfolio management process, hosting a joint application development (JAD) session, and developing a to-be process flow model.

Washington Association of School Business Officials (WASBO)

Various Positions | November 2014 – March 2018

The Washington Association of School Business Officials (WASBO) is a professional association providing programs and services to promote best practices of school business management, professional growth, and the effective use of educational resources.

Business Analyst | December 2015 – March 2018

John offered and implemented technology solutions in a cost-effective way, including:

- Proposed and implemented a learning management system to increase training program offerings, extending the organizational reach and increasing revenue
- Assumed project leader role for the initiative
- Identified the need for hardware/software upgrades and spearheaded negotiations with Cisco/Ednetics to develop a strategic in-kind partnership to fulfill business upgrade needs
- Designed, tested, and developed a full-stack web application enabling members to track workshops they attended and generate a certificate of completion using a JavaScript framework - Meteor.js
- Created a database to house annual conference workshop data and provided trend analysis for future events
- Provided website management (Wasbo.org) and HTML email communication design
- Administered improvements for tracking, reporting, and analysis of website performance

EDUCATION

- Master of Business Administration | Saint Martin's University, School of Business
- International Business and Economics | The University of Duisburg Essen, Mercator School of Management
- Bachelor of Science, Computer Science | Evergreen State College

CERTIFICATIONS

- Free Code Camp Front-End Developer Certificate
- International Software Testing Quality Board (ISTQB) Foundation Level testing certification (CTFL)
- Eclipse IV&V Certification
- SAFe Certified Scrum Master

Sibyl Govan, MES Subject Matter Expert

PROFESSIONAL BIOGRAPHY

Sibyl brings 11 years of experience providing Independent Verification and Validation (IV&V) and Quality Assurance (QA) services to state governments engaged in large-scale systems projects. She is well-versed in Medicaid Information Technology Architecture (MITA), Medicaid Enterprise Systems (MES), and MES Certification. She possesses a broad knowledge of telecommunications, database administration, geographic information systems, and enterprise architecture. Sibyl is an experienced public manager. Prior to becoming a consultant, she spent 13 years managing information technology projects and people for Montana state government and the private sector.

RELEVANT PROJECT EXPERIENCE

Delaware Department of Health and Social Services, Division of Medicaid Management and Administration (DMMA)
MITA State Self-Assessment and Online Tool
MITA SS-A Project Manager | September 2022 – Present

Sibyl leads a team that provides consulting services related to MITA State Self-Assessments and IT strategic planning. Over the course of this three-year project, PCG will facilitate the completion of an initial MITA SS-A and then help DMMA staff become self-sufficient in maintaining and updating the SS-A annually using an online tool. The PCG team will also help DMMA develop its IT Strategic Plan for a modular MMIS replacement.

State of South Dakota Department of Social Services Division of Economic Assistance
Independent Verification & Validation Services for Medicaid & Children's Health Insurance Program (CHIP) Eligibility System Implementation
IV&V Project Manager | July 2022 – Present

As the IV&V project manager, Sibyl is responsible for the on-time delivery of IV&V services. She coordinates and performs IV&V assessments, prepares reports, and presents findings and recommendations to executive audiences. She advises the client on how to prepare for ORR and CR reviews under Streamlined Modular Certification guidance.

State of South Dakota Department of Social Services Division of Economic Assistance
Independent Verification & Validation Services for Medicaid & Children's Health Insurance Program (CHIP) Eligibility System Implementation
IV&V Technical Subject Matter Expert | December 2021 – June 2022

Sibyl worked as part of a team providing IV&V services to South Dakota's Medicaid Eligibility and Enrollment system modernization project. As the technical subject matter expert, Sibyl's primary responsibilities included evaluating the project's system development processes and deliverables. She identified risks, made recommendations, and contributed to the development of the monthly IV&V report.

California Department of Social Services, Child Welfare Services
Child Welfare Services - California Automated Response and Engagement System (CWS-CARES) Independent Verification and Validation (IV&V)
IV&V Analyst | December 2021 – April 2022

Sibyl provided IV&V services to California's Child Welfare Information System (CCWIS) project. Her primary responsibilities include evaluating the project's system development, release management, and data conversion-related processes and deliverables. She identified risks, made recommendations, and participated in the development of the monthly IV&V report.

Public Knowledge, LLC
Multiple Projects
Management Consultant | May 2018 – October 2021

Sibyl led teams providing project management and technology consulting services to state government clients engaged in large-scale systems projects.

Sibyl was the project manager for the following projects:

- Independent Validation and Verification (IV&V) and Quality Assurance (QA) for the Washington Health and Human Services Coalition and Medicaid Enterprise
- QA for the Oregon Department of Environmental Quality's Environmental Data Management System project
- IV&V for the Oregon Health Care Authority's ONE Integrated Eligibility System project.

For each of these projects, Sibyl identified project risks, provided actionable recommendations, and led the development of monthly and quarterly IV&V or QA reports. She reviewed state and vendor project deliverables against industry standards and best practices. She helped her clients navigate complex federal certification requirements and state project gate approvals.

Courtview Justice Solutions / Equivant
JWorks Implementation Projects
Project Manager | December 2016 – April 2018

Sibyl managed six concurrent JWorks Court Case Management System implementation projects. She supervised business analysts and other project resources, represented the company to the client, and communicated customer requirements to an agile software development team. She led all configuration and implementation activities, communicated project status to executive audiences, and maintained the project management plan and project schedule.

EDUCATION

- Master of Public Administration | University of Montana – Missoula, MT

CERTIFICATIONS

- Agile Certified Practitioner, 2015 | Project Management Institute | 1803637
- Project Management Professional, 2007 | Project Management Institute | 493531

3 PRICING

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

Deliverable	Year One (1)	Year Two (2)	Year Three (3)	Total Amount
Case Management	$275,010.00	$200,017.50	$200,017.50	$675,045.00
Hearing and Grievance	$275,010.00	$200,017.50	$200,017.50	$675,045.00
Refactor PMMIS/HPMMIS	N/A	$330,000.00	$330,000.00	$660,000.00
			Three (3) Year Project Grand Total	**$2,010,090.00**

Optional Services A				Total Amount
SI Systems	$175,000.00	$175,000.00	$175,000.00	$525,000.00

Optional Services B Snow Modules:				Total Amount
User Licensing	$0.00	$0.00	$0.00	$0.00
ServiceNow Instance Cost	$0.00	$0.00	$0.00	$0.00
Customer Service Management (CSM) Professional Module	$75,000.00	$75,000.00	$75,000.00	$225,000.00
IT Service Management (ITSM) Enterprise Module	$75,000.00	$75,000.00	$75,000.00	$225,000.00
Human Resource Service Delivery (HRSD) Professional Module	$75,000.00	$75,000.00	$75,000.00	$225,000.00
IT Operation Management (ITOM) Module	$75,000.00	$75,000.00	$75,000.00	$225,000.00
Strategic Portfolio Management (SPM) Professional Module	$75,000.00	$75,000.00	$75,000.00	$225,000.00
Integrated Risk Management (IRM)	$75,000.00	$75,000.00	$75,000.00	$225,000.00

The table below provides hours and rates for IV&V of Case Management, Hearing and Grievance, and Refactor PMMIS/HPMMIS projects.

Rates and Hours

Position Title	Hourly Rate	Year 1 Hours	Year 2 Hours	Year 3 Hours	Total
IV&V Project Manager	$180	1,802	1,802	1,802	$973,080
IV&V Analysts	$165	1,324	2,415	2,415	$1,015,410
Technical SME	$180	20	20	20	$10,800
Medicaid Enterprise Systems SME	$180	20	20	20	$10,800
					$2,010,090

We have estimated the rate for each individual ServiceNow module, but there would be substantial savings to AHCCCS if multiple modules were reviewed in parallel. PCG is open to negotiating these estimates once more information on the scope and schedule is known.

Assumptions:

1. The year 2 and 3 IV&V hours/costs for Case Management and Hearing and Grievance will decrease as some PM hours will be shifted to the Refactor PMMIS/HPMMIS project.
2. No hours/cost have been included for the Refactor HPMMIS/PMMIS project in year 1, as Section 5.4 of the Task Order indicates this project will begin in calendar year June 1, 2024.
3. No cost was included for User Licensing or ServiceNow Instance Cost modules in Table 5 above, as these line items appear to be set up and provisioning activities to stand up the ServiceNow software rather than modules that will require extensive configuration or customization. Cost/hours for those line items can be added if desired by AHCCCS.

APPENDIX – QUARTERLY IV&V SAMPLE REPORT

A sample of PCG's quarterly IV&V report is provided on the next page.

1. SUMMARY

This section provides the [Client Agency Name] with a summary of the IV&V Monthly Status Report deliverable. The summary view is designed to provide the [Client Agency Name] executives and senior management with an indication of overall IV&V ratings by category.

[This deliverable summarizes activities and highlights new preliminary concerns, risks, and/or issues identified during the reporting month. Updates to previously identified preliminary concerns, risks, and/or issues are also provided.]

[Some clients like a one-paragraph written summary about the most critical things that happened during the reporting period. If your client appreciates that, include it here.]

1.1 Executive Project Dashboard

This dashboard is designed to provide an overview of the current project effort, from an IV&V perspective, decomposed into major relevant categories.

[Project Name] - Executive Project Dashboard of IV&V Assessment Categories

Assessment Category	Rating	IV&V Observations
[insert assessment area] *[NOTE: The categories included in this template are the standard to use if the project does not specify areas in the Task Order.]*	*[provide color-coded indicator from key]*	*[Include a brief description of findings/risks/issues that were managed during the reporting period and an indication of whether the area has improved, declined, or there were no significant changes during the reporting period.*
6.1.1 Schedule Management	M	
6.1.2 Resource Management	H	
6.1.3 Scope and Requirements Management	M	
6.1.4 Technical Solution Management	M	
6.1.5 Data Management / Migration / Conversion	L	
6.1.6 Quality Assurance, Testing, Defect Resolution, Re-Testing	L	
6.1.7 Project Governance and Communication	L	
6.1.8 Financial Management	L	
6.1.9 Change, Issues, & Risks Management	L	
6.1.10 Documentation & Deliverables Management	L	
6.1.11 Security Management	M	
6.1.12 Training, Go-Live & Post-Implementation Support	L	
6.1.13 Case Management	L	
6.1.14 Hearing and Grievance	L	
6.1.15 Refactor PMMIS/HPMMIS	L	

Category Rating Legend					
L	Low – The current risk to overall project quality is low.	M	Medium – This category presents a substantial risk to overall project quality.	H	High – This category presents a catastrophic risk to overall project quality and requires immediate attention.

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