



Supporting Choice. Managing Costs.™

Commonwealth of Pennsylvania
Department of Public Welfare
Office of Administration
Division of Procurement

Fiscal Employer/Agent Financial Management Services

TECHNICAL - INTEGRATED SOLUTION

July 13, 2012 2:00 PM

RFA #: 22-11

Department of Public Welfare
Division of Procurement
Issuing Office at Room 402
Health and Welfare Building
Attn: Mr. Daniel Boyd
625 Forster Street
Harrisburg, PA 17120



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Boston, Massachusetts 02109
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Supporting Choice. Managing Costs.™

July 11, 2012

Daniel R. Boyd, Director
Department of Public Welfare Division of Procurement
Issuing Office at Room 402
Health and Welfare Building
Harrisburg, PA 17120

Re: DPW RFA # 22-11 Vendor Fiscal/Employer Agent Financial Management Services,
Integrated Solution - Technical

Dear Mr. Boyd:

PCG Public Partnerships, LLC (PPL) is pleased to provide the attached changes to our Technical proposal for Request for Application (RFA) No. 22-11, Vendor Fiscal/Employer Agent Financial Management Services (VF/EA FMS) reflecting an integrated solution for the Western and Eastern Regions (Lots #1 and 3). Changes to our Cost Proposal have been submitted separately.

Because PPL had already presented a Work Plan and Project Management Approach that reflected concurrent implementation planning and execution, we do not feel that an update to the Implementation Project Plan submitted as part of our recent BAFO is needed. We would follow the proposed schedule. We intend to use the same technology platform for each region, and our systems have the capacity to handle the scale of both regions. Similarly, the same processes and procedures will be used in both regions. We have been in the process of expanding our operational infrastructure, and will move into a larger Program Management office in Harrisburg on September 1, and will be moving to a new, centralized operations facility on August 1, 2012 that will have appropriate space to accommodate sufficient staff required to support both regions. In addition, we have been conducting extensive contingency planning sessions with internal Human Resources staff and external staffing agencies to line up the process for bringing on additional resources.

In order to manage the integrated solution and facilitate the transition and ramp up in staffing, the primary changes to our technical approach are as follows:

- 1) The addition of Program Management resources to provide additional oversight and coordination of the transition process and ongoing regional support once the program is implemented. Specifically, we have added an Assistant Program Manager for each region, reporting to the Program Manager for the state. These Assistant Program

Managers have extensive experience within the existing PA DPW programs, which will facilitate smooth transition.

- 2) The addition of two senior PPL executive management resources to our Launch Team to support the program launch. Specifically, we will assign two Associate Managers to assist in the areas of new staff training and mentoring. Each senior manager will play a leadership role in an assigned region.
- 3) The use of a highly qualified Customer Service subcontractor, LiveOps, to support PPL Customer Service in covering peak periods of call volume, particularly during the initial transition of over 17,000 participants.

These changes are covered in more detail in the attached "Changes to Technical Proposal to Implement the Proposed Integrated Solution".

PPL is committed to providing DPW with the most technically responsive and operationally sound financial management services possible. We look forward to the opportunity to further our work for the Commonwealth of Pennsylvania and would be honored to be selected to serve DPW as a VF/EA FMS.

We would be happy to present PPL's proposal in person at the convenience of DPW. Please do not hesitate to contact me if you require additional information in consideration and evaluation of the proposed integrated solution.

Sincerely,



Marc H. Fenton
President

Changes to Technical Proposal to Implement the Proposed Integrated Solution

Overview

Because PPL had already presented a Work Plan and Project Management approach that reflected concurrent implementation planning and execution, we do not feel that an update to the Implementation Project Plan submitted as part of our recent BAFO is needed. We would follow the proposed schedule. We intend to use the same technology platform for each region, and our systems have the capacity to handle the scale of both regions. Similarly, the same processes and procedures would be used in both regions. We have been in the process of expanding our operational infrastructure, and will move into a larger Program Management office in Harrisburg on September 1, and will be moving to a new, centralized operations facility on August 1, 2012 that will have appropriate space to accommodate sufficient staff required to support both regions. In addition, we have been conducting extensive contingency planning sessions with internal Human Resources staff and staffing agencies to line up the process for bringing on additional resources.

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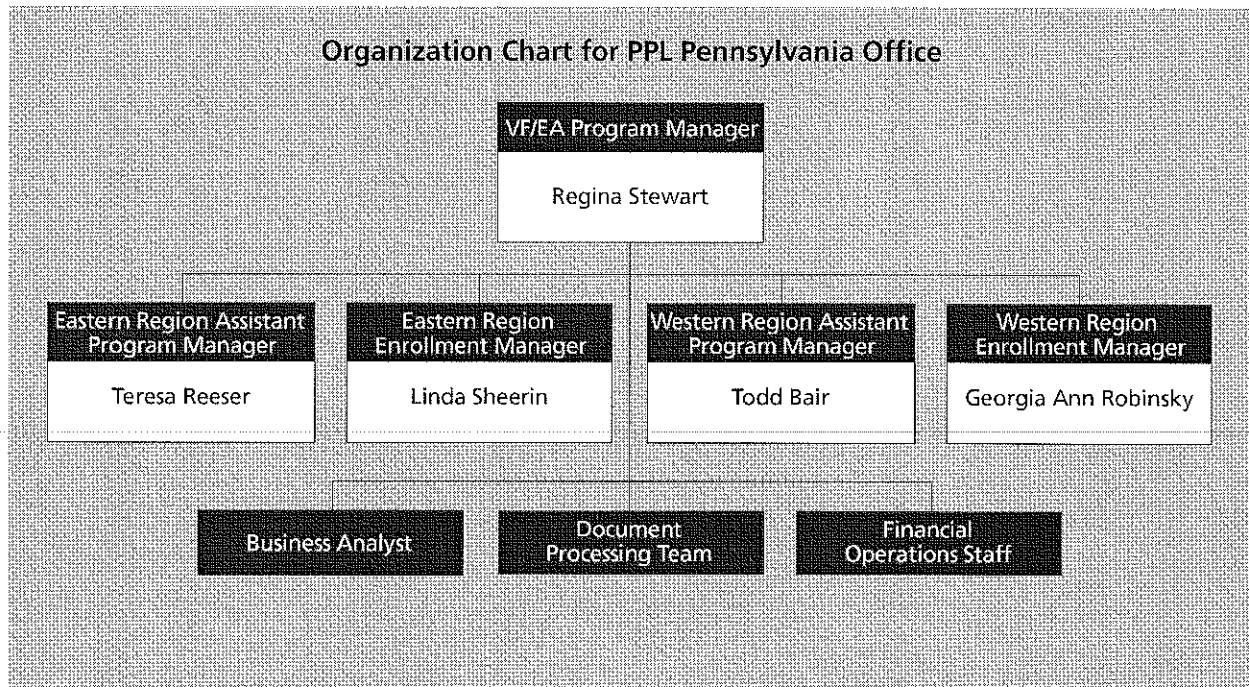
- 1) The addition of Program Management resources to provide additional oversight and coordination of the transition process and ongoing regional support once the program is implemented. An Assistant Program Manager for each region has been added to the organization structure, reporting to the Program Manager for the state. These Assistant Program Managers have extensive experience within the existing PA DPW program, which will facilitate transition.
- 2) The addition of two senior PPL executive management resources to our Launch Team to support the program launch. Specifically, we will assign two Associate Managers to assist in the areas of new staff training and mentoring. Each senior manager will play a leadership role in an assigned region.
- 3) The use of a highly qualified Customer Service subcontractor, LiveOps, to support PPL Customer Service in covering peak periods of call volume, particularly during the initial transition of over 17,000 participants.

Specific changes to our proposal are identified below referencing the appropriate section:

Section II-3 – Organization Chart

In order to provide added management oversight and additional resources to support two regions, we propose to add an Assistant Program Manager (APM) position to each region reporting to the Program Manager for the state, Regina Stewart. To accomplish this, we propose to move the person previously designated as the Enrollment Manager for the Central Region, Linda Sheerin, to be the Enrollment Manager for the Eastern Region, and move the person originally designated as the Enrollment Manager for the Eastern Region, Teresa Reeser, to the Assistant Program Manager position for the Eastern Region. In addition, we propose hiring a new Assistant Program Manager for the Western Region, Todd Bair. These individuals have committed to joining PPL, contingent upon contract award. Each person is extensively qualified for these roles based on their experience with current providers in the Commonwealth. The resumes for the newly assigned staff (Todd Bair – APM Western Region) and reassigned staff (Linda Sheerin – Enrollment Services Manager, Eastern Region and Teresa Reeser, APM Eastern Region) are provided in the appendix of this document. A Job Description for the Assistant Program Manager is also attached.

The following depicts an updated Organization Chart for our Pennsylvania office.



Section III-3, IV-3 Requirements, b. Subcontracting

In order to improve our ability to cover peak periods of call volume and to offset some of the new staff hiring requirements, PPL proposes to use LiveOps as a subcontractor to support our Customer Service Center.

LiveOps is a leader in cloud contact center and customer service solutions. They support a wide range of industries including financial, health care, insurance, retail, and high tech. Their solution has garnered numerous awards and the business of many well-known brand names including Metropolitan Life Insurance, AAA Emergency Road Services, and Salesforce.com. They manage operations for the largest US-based cloud contact center of 20,000 home-based, independent agents.

Our subcontract with LiveOps provides an effective solution to maintaining our high quality standards and having the capacity required to meet peak call volume needs. LiveOps will have a specific set of call types that will be routed to them during peak overflow or other special circumstance times. We have established escalation procedures to allow LiveOps representatives to transfer calls to PPL staff when customers request assistance outside of their scope or ability. LiveOps provides on-line real-time visibility into the queue of work assigned to them. Oversight of the LiveOps staff will be conducted in parallel by LiveOps supervisory staff and PPL management resources.

LiveOps, Inc. is a Delaware corporation and is headquartered in Santa Clara, California (5425 Stevens Creek Blvd., Santa Clara, CA 95051). PPL does not have any ownership interest in LiveOps. LiveOps complies with all conflict of interest requirements of the RFA and is not a part of, or affiliated with, any provider of home and community based waiver services. In addition, LiveOps will comply with all Domestic Workforce utilization requirements. LiveOps will complete HIPAA Privacy and Security training and sign a Confidentiality Agreement prior to performing any work.

Section II-5 Personnel

In addition to the personnel changes described in Section II-3 above, we are also adding two senior PPL executive management resources to the project to take a lead role in an assigned region and support the Program Launch Staff until the program is fully operational and has achieve steady-state operations.

David Horvath, an Associate Manager, will take lead responsibility for the Western Region. Peter Quinn, an Associate Manager, will take lead responsibility for the Eastern Region.

Executive Staff	Title	Location	Years with PPL
David Horvath	Associate Manager	WV	5
Peter Quinn	Associate Manager	VA	1.5

David and Peter have decades of experience in senior leadership roles and have extensive knowledge of participant direction and FMS requirements. Both of these Associate Managers have recently had a Senior Program Manager hired to support them on their existing programs to provide them with the additional capacity to support potential PPL growth initiatives, such as PA DPW.

The Resumes of David Horvath and Peter Quinn are provided in the Appendix to this document.



Appendix

Please find attached resumes and the Assistant Program Manager job description.

TODD BAIR

Public Partnerships, LLC
Assistant Program Manager

PROFESSIONAL BACKGROUND

accessAbilities, Inc.

Fiscal / Employer Agency (F/EA) Director,
March 2011 – Present

accessAbilities provides home and community based services for children, adults, and seniors with disabilities. Primary responsibilities include: day to day management of the F/EA department and staff along with providing Financial Management Services to participants who choose to take an active role in directing their own services. These services include: managing enrollment services, budget management, provider billing, payroll processing for over one thousand workers, state and federal regulatory compliance – all while overseeing a thirteen million dollar budget funded by waiver programs through the Center for Medicare / Medicaid Services and Pennsylvania's Office of Long Term Living.

TAB, LLC

Business & Financial Consultant / Principal,
March 2010 – March 2011

TAB, LLC provides small local businesses with technical and financial services, using a systematic approach for improvements and efficiencies in day to day operations. Responsibilities focused on management of corporate finances, accounting, payroll and administrative functions, including office management, accounts receivable, accounts payable and benefits.

Ripple Effects Interactive, INC.

Director of Finance, May 2000 – March 2010

As a Member of Executive Team, responsibilities focused on the overall corporate business strategies and decision making, developing the financial and operational side of the business. The company specialized in

multimedia development of colleges/universities, tourism and non-profit organizations which included the State of PA Department of Tourism and Economic Development. With headquarters in Pittsburgh, supported growth of the business to over sixty clients nationwide and expanding offices regionally in Philadelphia, New York and Washington D.C.

With a six million dollar annual budget, managed all corporate finances and administrative functions, including reporting, business planning, forecasting, budgeting, accounts receivable, accounts payable, customer profitability analysis, competitor analysis, product and unit costing, internal controls, and financial analysis. Added responsibilities included management of all IT administration and human resources functions, performing as the primary contract administrator, and acting as legal advisor/liaison for all corporate matters.

C.S. McKee & CO., Inc.

Accounting Manager / Investment Analyst,
August 1996 – May 2000

Responsible for all aspects of Financial and Operational Reporting; managed and processed all accounting information plus, management of all operational issues including client accounting, trading activity and mutual fund concerns. Provided critical analysis used for investment and MIS decision-making. Responsibilities also included developing and maintaining all books and records, plus adhering to SEC, IRS and AIMR regulations.

Mellon Bank of Pittsburgh

Accounting Unit Manager; Promotion, February
1995 – August 1996

Financial Reporting, Budgeting & Forecasting, Internal Auditing, Cash Management, System Project Leader, Managed fifteen staff accounts and Two Team Leaders, Received Premiere Achievement Award for Excellence.

Senior Accountant, August 1992 – February

1995

Produced & reviewed standard/customized Financial Statements, Bank Reconciliations, Internal Auditing, Managed eight staff accountants, Developed software reconciliation package, Received Premiere Achievement Award for Excellence.

Greater Charleroi Chambers of Commerce
Accounting Intern, January-April 1992

Converted new corporate accounting system (Great Plains), Structured and processed monthly financial statements and year end (89, 90, 91) closing entries, Assisted their bookkeeper with the recording and distribution of payroll and taxes and also with the recording of accounts payable and receivables.

VOLUNTEER POSITIONS

United Way of America

Campaign Chair accessAbilities, Inc.

March 2011 – present

Ligonier Valley Learning Center

Boys Youth Summer Camp Counselor

Summer 2009 - 2010

EDUCATION

Washington Jefferson College, May 1992

Bachelor of Arts in Economics and Business

LINDA SHEERIN
Public Partnerships, LLC
Enrollment Services Manager

PROFESSIONAL BACKGROUND

Abilities in Motion

Consumer Services Manager, 2004 – Present
Trained Consumer Enrollment Agents to complete all paperwork with and to train new consumers in their responsibilities as an employer. Developed tick list tracking to ensure quality assurance over form completion and submission for compliancy and monitoring oversight. Handled all requests and questions from referring agencies, including in large part, Area Agencies on Aging in regards to program services. Processed 3,000 new consumers over the last four years for multiple wavier programs. Implemented call center and system tracking for consumer call resolution. Instrumental in start-up operations of the ODP Agency with Choice FMS service provision, including transfer of consumers from a V/FEA service model. Tracked key measures of growth and other trends analysis. Promoted an extreme Customer Service System of response.

Managed staff of seven in implementing payroll, benefits, hiring, and training. Negotiated contracts for temporary staffing
Set-up quality management procedures for staff evaluation. Set up surveys to measure our quality of training consumers in their responsibilities as employers

The Pottstown Mercury, Pottstown, PA
Classified Agent
Sept. 2003 – April 2004

ProClinical, Inc., Phoenixville, PA
Human Resources Manager
April 1996 – April 2003

KIWI Brands, Douglassville, PA
Payroll & Benefits Administrator
Sept. 1994 – April 1996

Computer Technology

Completed advanced training in use of Excel Spreadsheets. Completed course in use of Access Databases. Installed and modified new computerized system to scan timesheets and bill state for services

Seminars and Professional Organizations

Member of OLTL Forms Development Committee. Attended ICADI, St. Petersburg, Florida, in January 2006 as a poster presenter
Attended NCIL, Washington, D.C., training seminar and rally in 2005. Attended ASA/NHOA Joint Conference, Chicago, Illinois, training seminar in March of 2007

EDUCATION

LaSalle, Manderville, LA
Human Resources Management
B. S., 2002

TERESA L. REESER
Public Partnerships, LLC
Assistant Program Manager

PROFESSIONAL BACKGROUND

United Disabilities Services

FMS Operations Manager, June 2009 – Present

Responsible to oversee all components of the provision of FMS and insure full delivery of services to consumers choosing participant directed services in Pennsylvania Home and Community-Based Services Waivers including Attendant Care, Independence, OBRA, CommCare, Aging and State-Funded Program Act 150.

Oversight of FMS to include implementation, maintenance and compliance of all requirements for the delivery of FMS. Full knowledge and understanding of FMS standards and Common Law Employer, Direct Care Worker and Vendor Requirements. Develop all forms and processes as required by FMS standards. Develop FMS policy and procedure manual. Develop relationship with referring agencies and supports coordinators and provide training on FMS services. Establish customer service function to receive all participant and direct care worker phone calls and correspondence.

Manage the enrollment and disenrollment of consumers receiving participant directed services and their Direct Care Workers. Develop Participant and Direct Care Worker Enrollment packets including all requirement forms. Developed and implemented participant orientation and training program. Create disenrollment process and forms. Conduct regular audit of files to insure all appropriate documentation has been obtained and filed as specified by standards. Periodically review enrollment packet of information to insure all documents are current.

Manage the entire payroll and billing process for all consumers receiving participant directed

services to insure accuracy in paychecks and compliance with federal, state and local reporting and proper billing of services rendered.

Clover Solutions LLC

Owner/Consultant/Accountant/Business & Financial Analyst/Trainer, 2001 – 2009

Provided business consulting, accounting and payroll services to small and medium size businesses. Conducted needs analysis, prepared proposals, developed specialty spreadsheets, end-user application training, general software and business consulting, implementation and support of business management, point-of-sale and accounting software solutions, including Microsoft Dynamics GP, Microsoft Small Business Financials, and Microsoft Retail Management. Managed staff of implementation and development consultants.

Late Nites Hair Design

Accountant/Business Manager, 1991-2008

Responsible for all daily and monthly accounting, payroll, and tax reporting functions.

Weidenhammer Systems Corporation

Implementation Consultant/Sales

Consultant/Certified Account Executive, 1999-2001

Responsibilities exclusively related to Microsoft Great Plains Business Management and Accounting Software, Dynamics and eEnterprise.

EDUCATION

Alvernia College

B.A. in Accounting, Banking & Finance, and Business Management & Administration

Penn State University

Undergraduate Courses

DAVID R. HORVATH
Public Partnerships, LLC
Associate Manager

RELEVANT PROJECT EXPERIENCE

Financial Management – DC Veterans Directed Home and Community Based Services

March 2001 – Present

Responsible for administration and oversight of financial management services under contract with Iona Senior Services. Duties include contract management, personnel management, policy development, quality assurance and reporting.

Third Party Administration – Ohio Department of Health

March 2010 – Present

Responsible for administration and oversight of statewide Third Party Administration services for the Ryan White HIV/AIDS Treatment Extension Act of 2009 Part B Program. Duties include contract management, personnel management, policy development, quality assurance and reporting.

Third Party Billing and Fiscal/Employer Agent – New Jersey Department of Health and Senior Services – Division of Aging and Community Services

June 2007 – Present

Responsible for administration and oversight of statewide third-party billing and fiscal employer agent services for the *Global Options* Medicaid waiver program and the Jersey Assistance for Community Caregiving (JACC) program. Duties include contract management, personnel management, policy development, quality assurance and reporting.

Fiscal/Employer Agent and Resource Consulting – West Virginia Department of Health and Human Resources – Bureau for Medical Services

December 2006 – Present

Responsible for administration and oversight of statewide fiscal/employer agent and resource consulting services for West Virginia home and community based services. Duties include contract management, local office management, personnel management, policy development, quality assurance and reporting.

Financial Management – Community Living Program

October 2008 – June 2009

Responsible for administration and oversight of financial management services for Administration on Aging funded Community Living Program in 15 counties in the Potomac Highlands of West Virginia. Duties included contract management, personnel management, policy development, quality management, and reporting.

PROFESSIONAL BACKGROUND

West Virginia University Center for Excellence in Disabilities 2003-2006

Policy Specialist

Responsible for facilitating statewide systems change in Medicaid home and community based services in West Virginia, including assisting in development of self-directed personal assistance services for adults with disabilities and seniors. Duties included coalition building, strategic planning, policy development, grant writing, research, training and technical assistance.

Greene Arc, Inc. 1997-2002

Executive Director

Chief executive officer of non-profit agency providing county-wide residential, vocational and day treatment services for adults with developmental disabilities in southwestern Pennsylvania. Duties included administration of licensed behavioral health programs, development of \$2.5 million annual budget, and personnel management.

**Virginia Department of Rehabilitative Services
1992-1997**

State Transition Coordinator

Coordinator of school-to-work transition services for secondary students with disabilities. Duties included contract management, grants management, supervision of transition specialists, coordination of statewide council, training and technical assistance.

**Woodrow Wilson Rehabilitation Center
1986-1992**

Transition Coordinator

Responsible for coordination of vocational evaluation and transition planning for secondary students with disabilities, including interdisciplinary team development, transition planning, case management, family relations, vocational evaluation, report writing, data collection and analysis.

EDUCATION

Doctoral Candidate in Educational Leadership and Policy Studies, West Virginia University

Master of Science in Rehabilitation Counseling and Vocational Evaluation, West Virginia University, 1987

Bachelor of Science in Recreation and Parks Management, West Virginia University, 1985

SELECT PRESENTATIONS

When People Can Choose; What Do They Choose? 2009 International Conference on Self-Determination, David Horvath & Tara Himmel

Changing Attitudes about Self-Direction, 2009 West Virginia Summer Institute on Aging, David Horvath & Sally Burchfiel

SELECT PUBLICATIONS

Horvath, D.R. (2009). Research Brief: *Consumer Satisfaction with Self-Direction in West Virginia Personal Options*. Boston, MA: Public Partnerships, LLC.

Horvath, D.R. (2006). *The Direct Care Workforce: Medicaid Funded Personal Assistance Services in West Virginia*. Morgantown, WV: Center for Excellence in Disabilities, West Virginia University.

Horvath, D.R. (2006). *Survey Reveals Information on Direct Support Workforce*. Developments: Center for Excellence in Disabilities, West Virginia University, 6(1), 1-2.

Horvath, D.R. (2005). *Real Choice Grant Activities Support Olmstead Plan*. Morgantown, WV: Center for Excellence in Disabilities, West Virginia University.

Burchfiel, S., and Horvath, D.R. (2005). *Next Steps: Transition Planning*. Morgantown, WV: Center for Excellence in Disabilities, West Virginia University.

Horvath, D.R. (2004). *Finding Common Ground: Creating Inclusive Communities in West Virginia*. Morgantown, WV: Center for Excellence in Disabilities, West Virginia University.

Horvath, D.R. (1996). Transition planning: Preparing for Tomorrow Today! *OUTLOOK: Learning Disabilities Association of Michigan*, 28(3), 1-4.

Hanwit, J.M., English, T.W., et.al. (1996). *Manual for the Team Builder: A guide for creating peaceful and productive community transition councils*. Norfolk, VA: Virginia Department of Education.

DeMoss, S., and Horvath, D.R. (1992). Integrating academics in vocational assessment,

education, and training. *Sixth National Forum on Issues in Vocational Assessment: The Issues Papers.*

Horvath, D.R., and Ashley, J.M. (1992) Implementation of vocational assessment results in transition planning. *Fifth National Forum on Issues in Vocational Assessment: The Issues Papers*, 233-238.

ACTIVITIES & HONORS

Peer Reviewer – Centers for Medicare and Medicaid Services, Real Choice Systems Change for Community Living Grants Program (2004-2006)

Certified Incident Investigator – Pennsylvania Department of Public Welfare (2001)

Administrator of the Year – Virginia Association Vocational Education Special Needs Personnel (1997)

Professional Fellow – Virginia Collaborative Leaders Program, Academy for Educational Development, Institute for Educational Leadership (1997)

Peer Reviewer – United States Department of Education Discretionary Grants Program (1996-2002)

Member – President's Committee on Employment of People with Disabilities (1988-1991)

President – Virginia Vocational Evaluation & Work Adjustment Association (1988)

RELATED EMPLOYMENT

Ski Instructor – Wintergreen Resort (1988-1991)

Youth Mentor – Governor's Summer Youth Institute, Virginia (1987-1989)

Program Director – Camp Kno-Koma for Diabetic Youth, West Virginia (1986)

Waterfront Director – Beacon Lodge Camp for the Blind, Pennsylvania (1985)

PROFESSIONAL REFERENCES

Dr. Joseph M. Ashley – Virginia Department of Rehabilitative Services (804) 662-7000

Dr. Sharon deFur – The College of William and Mary, School of Education (757) 221-2150

Ms. Frances V. Koehler – Koehler Consultation Services (804) 740-4245

Mr. James Strosnider – Monongalia County Health Department (304) 598-5151

Ms. Kathy Trossi – Woodrow Wilson Rehabilitation Center (800) 345-WWRC

PETER J. QUINN
Public Partnerships, LLC
Associate Manager

Over 30 years of healthcare management within clinical, healthcare facilities, commercial information system vendors delivering systems to hospitals, managed care organizations, Medicare Intermediaries processing Part B claims, and Medicaid Fiscal Agent (MMIS), Pharmacy Benefit Management support in Medicaid, and Medical and Behavioral Health utilization management/prior authorization services.

As Associate Manager and Project Director for the PPL Virginia Department of Medical Assistance Services, provides overall project oversight and guidance in development, implementation and management of Consumer-Directed Financial Management services programs for state funded and Medicaid Home and Community Based Services waiver recipients for the Commonwealth of Virginia. Currently the PPL program in Virginia Medicaid serves over 9,600 consumers and more than 14,000 provider/attendants in Medicaid Waiver Programs including: Elderly and Disabled, Intellectually Disabled, Developmentally Disabled, HIV/AIDS, EPSDT, and Child Mental Health supporting Consumer Directed Services.

PROFESSIONAL BACKGROUND

Chief Operating Officer, First Health Services Corporation Glen Allen, VA • July 2007 – August 2010

A Healthcare Information Management company focused on claims processing and clinical management for State Medicaid programs.

Managed the operations of First Health Services subsidiary of Magellan Health Services – responsible for all aspects of the organization including sales/marketing, product development, contracts, change management, project management, operations – including three national pharmacy call centers, Medicaid fee-for-service managed care services and pharmacy benefit administration services

- Implemented organizational change process to focus and stabilize First Health Services business as result of acquisition by Coventry Health Care
- Developed strategic business plans for First Health Services – one focused on transition

strategy for fiscal agent services and growth and expansion strategies for pharmacy benefit administration and fee-based managed care programs in Medicaid

- Through stabilization efforts in 4th quarter 2007 – both for revenue growth and expense control – resulted in most profitable year for the company
- Responsible for all acquisition activities to sell First Health Services to Magellan Health Services spring and summer 2009.

Senior Director Product Development, First Health Services (part of Coventry State Health Care), Glen Allen, VA • September 2006 – July 2007

Led multi-faceted team of Coventry Health Care and First Health Services leadership staff in developing a strategic plan for the newly expanded division focused on Medicaid.

- Developed Product Development process and focus for the Medicaid fee-for-service and risk-based managed care divisions of Coventry Health Care resulting in integration strategy aimed at expanded products and revenue
- Successfully completed project and promoted to Chief Operating Officer for First Health Services.

Vice President Marketing and Account Management, First Health Services, Glen Allen, VA • September 1998 – September 2006

- Established Marketing Department and approach for re-entry into the Medicaid market for First Health Services
 - Managed the proposal response team and produced winning proposals in the lines of business of: MMIS, Pharmacy Benefit Management, and Utilization Management
 - Developed and implemented a structured approach and organization for account management to support growing customer base in national Medicaid Pharmacy Benefit Administration program.
-

General Manager Healthcare Division, GTE Data Services, Temple Terrace, FL • October 1995 – January 1998

A Healthcare Information Management Company focused on software sales and operations for Medicare Part B, Medicaid, and Managed Care claims processing

- Provide leadership to multi-faceted organization responsible for providing sales/marketing, project management, systems development and operational support to three diverse business models – managed care claims processing, Medicaid fiscal agent services, and Medicare Part B claims processing
- Revenue for 1996 and 1997 outperformed forecasted revenue for both years
- Developed a successful investment protocol and process to receive research and development funds from GTE Corporate for product enhancements.

Various other positions held in Healthcare

- Director Sales – GTE Data Services – Temple Terrace, FL
- VP Sales and Marketing – Datacare Inc. – Roanoke VA – Hospital Information System vendor
- Director – Rehabilitation Services – St. Joseph's Hospital, Marshfield, WI - started and operated an acute care CARF accredited Rehab Program for stroke, spinal cord injured, cardiac, head trauma (adult and pediatric) patients in this 524 bed hospital
- Director – Occupational Therapy– St. Joseph's Hospital, Marshfield, WI
- Staff Therapist – Occupational Therapy– St. Joseph's Hospital, Marshfield, WI

Education

B.S. in Occupational Therapy

University of Wisconsin, Madison, WI

Masters in Business Administration (courses toward degree)

- *University of Wisconsin, Oshkosh, WI & Edgewood College, Madison, WI*
-

Company: Public Consulting Group, Inc.

Practice Area: Public Partnerships, LLC

Position: Assistant Program Manager

GENERAL SUMMARY:

The Assistant Program Manager (APM) is expected to be the primary support to the Program Manager on designated projects to ensure all programmatic management functions are fully met on an ongoing basis. The APM will attend all applicable program meetings to ensure the client expectations and operational requirements are consistently met while identifying opportunities for improvement. The PPL matrix organizational structure also requires the APM to provide additional oversight of financial operations and customer service teams to ensure program participants needs and requests are met in a professional and timely manner.

ESSENTIAL DUTIES AND RESPONSIBILITIES: (*Other duties may be assigned as appropriate and necessary*). The requirements listed below are representative of the knowledge, skill and competencies required to successfully support the client relationship and program operations.

Support the Client Relationship

- Serves as secondary (or primary when appropriate) contact for the client and key stakeholders during start up and steady state operations.
- Establishes and manages operations in accordance with PPL & project specific policies and procedures to ensure contractual compliance.
- Attends weekly client steering committee meetings/internal operations meetings to ensure actionable steps are followed through on in a timely manner.
- Communicates directly with program support staff such as care coordinators, service facilitators and support brokers to ensure enrollment processes are efficient and clearly communicated.
- Demonstrates in-depth knowledge of participant-directed service models and provides insight into best practices and project initiatives

Support the Management of Project Operations

- Ensures timely and accurate fulfillment of contractual obligations including ensuring all standing deliverables are met.
- Assists in the monitoring of operational performance to include enrollment and payroll processing, customer service support and service/admin claim management.
- Coordinates with PPL Information Technology to drive development enhancements to improve service delivery and process efficiency.
- Provides input about staff performance to Program Manager.

Additional Management Responsibilities

- Further ensures all operational team members understand day to day project priorities and deadlines.
- Ensures staff members are effectively performing all responsibilities as outlined in job description.
- Manages and coordinates proposal development research, financial analysis, writing and production.
- Responsible for advising the Program Manager on opportunities for process improvements and ensures the quality of work produced meets PPL and contractual standards.
- Responsible for coordinating the training and supervision of other management support staff such as Business Analysts.

Required Experience:

- Relevant Bachelor's degree required, Master's Degree preferred.
- 3-5 years progressive experience in complex project management
- 2 years prior supervisory experience required

Required Skills:

- Ability to speak clearly and articulate programmatic status and goals to the client and other stakeholders
- Detailed and process improvement oriented
- Ability to identify opportunities for improvement and innovation through technology or processes
- Strong analytical and organizational skills with an ability to analyze data and draw appropriate conclusions.
- Prioritizes tasks effectively and can attend to a broad range of activities.

PCG is an equal opportunity employer.