



STATE OF INDIANA

Request for Proposal 24-78771

Indiana Department of Administration

On Behalf Of

Family and Social Services Administration

Solicitation For:

Cost Allocation Services

Due Date and Time: March 29th, 2024 at 3:00 PM EST

**Attachment F--Appendix: §2.4 Technical Proposal
DSN's Project Staff Resumes**

Proposal Prepared by:

Diversified Services Network, Inc.





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Nick Petrone Engagement Manager

BACKGROUND

Mr. Nick Petrone has sixteen (16) years of experience in serving the State of Indiana, both as a State employee as well as his engagement as a consulting services vendor. His history with the State includes being a controller with the Division of Family Resources (DFR) and the Bureau of Motor Vehicles, as well as a Deputy Director for the DFR and the Division of Aging.

As an Engagement Manager for this critical Cost Allocation project for the Family and Social Services Administration (FSSA), Mr. Petrone is accountable for ensuring open and frank communications with the client and client satisfaction through DSN's execution and delivery of high-quality, cost allocation services. He will act as a point of escalation for addressing any needs or concerns of the client. In light of his close proximity to the Indiana Government Center, Mr. Petrone can be quickly available to resolve any mission-critical issues that may arise.

SKILLS & TECHNOLOGY

- Applications - MS Office Suite (Excel, PowerPoint, Word)
- Functional –Engagement, Facilitation, Communications, Active Listening, Operations, Administration, Procurement, Process Improvement, Accounting
- Certification – Certified Six Sigma Green Belt
- Community Involvement - Scecina Memorial High School Board Member, Chair of Our Lady of Lourdes Pro Life Committee, Variety of volunteer activities

PROFESSIONAL EXPERIENCE

Diversified Services Network, Inc.

Director of Business Development

11/2022 – Present

Accountable for developing relationships with potential clients, partners, and networking associates to create awareness and engagement for maximizing goodwill for the company and opportunities for Diversified Services Network, Inc. (DSN) to maintain and grow its business and influence to have a positive impact on those people and organizations it serves. Offers authentic and ethical leadership, energy, and ideas for increasing loyalty and knowledge of DSN's culture and exceptional services. Collaborates with fellow DSN team members to maximize productivity and continuously seek opportunities to improve internal processes and support DSN clients, partners, and other stakeholders.

- Develops and maintains strong, positive, and authentic, professional relationships, while always striving to do the right thing for the right reasons.
- Promotes and champions DSN by sharing its culture and expertise in serving its clients, partners, and other stakeholders, while building awareness of DSN's core service offerings of the company
- Engages actively with client stakeholders to ensure broad understanding of the initiatives, issues, and risks, while developing solutions that remains true to the vision and mission of the organization and create concurrence for executing the plan



- Shares expertise, market intelligence, and support with stakeholders, focusing particularly on state government agencies with a special emphasis in serving the most fragile populations and creating the most impact in the community.
- Documents and maintains, fastidiously, the essential and actionable information regarding professional relationships, including their needs, goals, and aspirations and how to support those companies or individuals through DSN's services, our network of partners and connections, and through our advice
- Nurtures and grows network of like-minded people committed to a service mindset for the betterment of clients, partners and the community, while also helping connect those in that network to create greater impact
- Communicates regularly with internal stakeholders to create awareness of potential opportunities and solicit support in driving those opportunities to fruition
- Leads periodic business development meetings and collaborates with the team to create synergy and trust, as well as to share vital, time sensitive, actionable information
- Offers advice and counsel to DSN leadership on strategic plans and how to operationalize the goals and aspirations of organization
- Acts as Engagement Manager for DSN's execution of projects to promote open, direct, and authentic communications to support client satisfaction and the delivery of high-quality services

netlogx

08/2014 – 09/2022

Outreach Consultant

Accountable for developing ever increasing awareness and interest in netlogx through multiple communication venues, while creating authentic, mutually beneficial long-term relationships with potential partners and clients, as well as the community at-large that emphasizes the operating principles of netlogx. Participates in building and maintaining strong brand awareness and loyalty by sharing the netlogx story and leading by example the axioms we profess. Collaborates with fellow netlogx team members to maximize productivity and continuously seek opportunities to improve internal processes and support netlogx clients.

- Develops and maintains strong, positive and authentic professional relationships
- Promotes and champions the netlogx culture and clearly shares how and why it is different than other organizations, while striving to live out those ideals in word and deed
- Builds awareness of the netlogx brand and the core service offerings of the company
- Engages actively with the required stakeholders to ensure broad understanding of the initiatives, issues, and risks while developing a strategy that remains true to the vision and mission of the organization and creating 'buy-in' to the plan of action
- Shares expertise and support to all stakeholders in state government agencies managed social services and public and private healthcare entities, particularly in those areas serving the most fragile populations.
- Documents and maintains, fastidiously, the essential and actionable information regarding professional relationships, including the needs, goals, and aspirations and how netlogx might support that company or individual through our direct services, our network of partners and connections, and through our advice
- Nurtures and grows network of like-minded people committed to a service mindset for the betterment of clients, partners and the community, while also helping connect those in that network to create greater impact

- Facilitates the Outreach Process using the tools and techniques prescribed by netlogx, while seeking opportunities to refine and improve the process, as an individual contributor and as a team
- Communicates regularly with internal stakeholders to create awareness of potential opportunities and solicit support in driving those opportunities to fruition
- Leads outreach meetings and collaborates with the netlogx team to create synergy and trust, as well as to share vital, time sensitive, actionable information
- Adheres to netlogx core principles and promotes those with team members as well as the external stakeholders

stafflogx

10/2013 - 08/2014

Division Director

Managed all hands-on operational aspects of the division and works closely with Leadership Team to create a new division that serves internal netlogx recruiting needs and those of external clients. Key responsibilities include:

- Developed and maintain a robust recruiting engine that allowed stafflogx to provide the right resources at the right time for our internal and external customers
- Built and document processes for recruiting
- Pursued constant process improvements and ensured that the processes were repeatable
- Created a 'warm network' of candidates who know netlogx and would be interested in coming to work for us when the time and opportunity are suitable

Chief Operating Officer

09/2011 - 10/2013

Manages all hands-on operational aspects of the company with a strong focus on consulting operations and sales. Key responsibilities include:

- Drove the company to achieve and surpass sales, profitability, cash flow and operational business goals and objectives
- Measured the effectiveness of all internal and external processes, providing timely, accurate and complete reports on the operating condition of the company
- Spearheaded the development, communication and implementation of effective growth strategies and processes
- Collaborated with the Executive and the management team to develop and implement plans for the operational infrastructure of systems, processes, and personnel designed to accommodate the rapid growth objectives of our organization
- Motivated and led a high-performance management team; attract, recruit and retain required members of the team not currently in place; provide mentoring as a cornerstone to the management career development program
- Acted as a strategic partner in development and execution of the organization's vision and mission

State of IN, Division of Aging, Family & Social Services Administration

10/2009 - 09/2011

Deputy Director

Responsible for leading and directing all operational activities, as well as all policy and procedures for the division's home and community-based services. Collaboratively engage with a myriad of internal and external stakeholders, including the Area Agencies on Aging, the CHOICE Board, the federal partners at the Administration on Aging (now called the Administration for Community Living).

- Reported to Director of the Division
- Directed and led the non-Medicaid programs for the Division of Aging
- Led the Division's role in providing improved, data analysis and reporting, while leveraging other FSSA resources for greater access to data
- Drove projects and initiatives for the division and agency to improve access to data (data warehouse)
- Provided leadership and executive project management for the implementation of new nutrition software
- Increased collaboration with key stakeholders outside of the Division, including Indiana Association of Area Agencies on Aging, American Association of Retired Persons, and Hoosiers for Options
- Assisted in management of the contract for the system technology vendor including key role in securing a new contract with greatly improved service level requirements, terms and conditions
- Leadership role in managing administration's key technology initiatives and projects including Integrated Case Management System and Medicaid Management and Information System
- Led division's Constituent Care operations to improve responsiveness to inquiries from citizens, legislators, consumers, providers and advocates
- Liaise with other care divisions within the FSSA to increase communication, collaboration and cohesive approach to meeting the needs of clients and the individual divisions
- Fostered a professional work environment that cultivates open communication and embraces change for improving processes and overall productivity

State of Indiana, Division of Family Resources, Family & Social Services Administration 05/2008 - 10/2009

Deputy Director

Responsible for leading the operations for all non-Supplemental Nutrition Assistance Program, Medicaid and TANF eligibility initiatives for the Division, including the Medicaid Burial, Constituent Care, "Welfare to Work" and Reporting Application for timely review of results of eligibility process.

- Reported to Director of the Division
- Managed the \$1.3M Medicaid Burial program for the Division, instituting new procedures, improved communications with the Funeral Homes and Cemeteries, greater coordination with the DFR offices
- Led division's Constituent Care operations to improve responsiveness to inquiries from citizens, legislators, clients, providers and advocates
- Drove project for new, dynamic reporting application by collaborating with stakeholders and subject matter experts
- Provided project oversight for Division relative to IBM's Corrective Action Plan in the areas of Communications, Training, and Notices to clients
- Liaise with other care divisions with FSSA to increase communication, collaboration and cohesive approach to meeting the needs of clients and the individual divisions
- Assisted in coordination with Division and its system technology needs with FSSA's Division of Technology and the Division's system's provider
- Led the Division's management of the 'welfare to work' initiative with the IBM-led Coalition



State of Indiana, Division of Family Resources, Family & Social Services Administration 09/2007 -05/2008

Controller

Responsible for managing the financial and budgetary matters for the Division of Family Resources.

- Reported directly to the CFO
- Provided leadership of the financial operations of the division, including monthly financial presentation, budget, special disbursements and A/P, as well as remote office needs
- Facilitated and assist in special projects, including Modernization activities, Maintenance of Effort requirements with Federal government and conversion to new integrated accounting system
- Instituted improved internal controls, segregation of duties, and revisions of policies and procedures

State of IN, Bureau of Motor Vehicles

03/2007 - 09/2009

Controller

Responsible for managing the financial operations matters for the Bureau of Motor Vehicles.

- Reported directly to the CFO
- Provided leadership of the financial operations of the agency, including treasury, procurement, contract management, reconciliation, collections, budget, A/P and payroll
- Instituted improved internal controls, segregation of duties, and revisions of policies and procedures
- Ensured compliance with distribution and reporting of funds to state and county authorities
- Led project for refund backlog that was in arrears (9700+) to current (less than 400)
- Collaborated with other stakeholders within the BMV to create synergy between the departments through increased communication and partnering
- Directed finance team with plan for conversion to the new integrated accounting system
- Responded to escalated calls from BMV customers to secure amicable resolution
- Facilitated and assisted in special projects (analysis with outside vendor, responses to new legislation)

Affiliated Computer Services, Inc., Health Administration

09/2003 - 03/2007

Division Controller

Responsible for all aspects of accounting and financial operations for the Division.

- Provided financial direction and support to Strategic Business Managers (4) and Divisional Vice President in the Indianapolis Division
- Coordinated and develop weekly financial reports expressing the expected results for revenue and profit for the month of the division
- Facilitated and maintained weekly A/R reporting
- Led the division in development of the annual budget and quarterly re-forecasting
- Participated in the implementation of incentive-based compensation
- Coordinated monthly billing process
- Led monthly “closing” activities and reporting for the Indianapolis Division
- Assisted in special payroll payments
- Led plan to correct past A/P challenges and maintain proper standards
- Shared energy and enthusiasm with the Indianapolis division, while striving to improve relationships with regional and corporate personnel on behalf of the division



All State Caulking Supply Co., (formerly Seward Sales)

06/1990 - 10/2002 (06/1987 -06/1990)

Vice President/Controller

Involved in developing and implementing strategic plans and budgets that provided direction in overcoming internal and external challenges faced in achieving greater sales growth and profitability.

- Involved in developing and implementing strategic plans and budgets that provided direction in overcoming internal and external challenges faced in achieving greater sales growth and profitability
- Partnered with the President to negotiate and execute legal agreements including vendor contracts, lease agreements, loans, employee agreements, health insurance and property insurance, as well as negotiated with commercial lenders to secure the most favorable terms and conditions
- Provided strong leadership and direction to personnel, operations, sales, quality control and financial functions, which encompassed over 30 employees for a multi-location, multi-state distribution company with revenues of approximately \$9.5 million
- Implemented the company vision and philosophy developed by the President, which resulted in the building of an effective team that was highly motivated and productive
- Managed and directed accounting functions in accordance with GAAP, which included supervision of 4 employees that handled accounts receivable, accounts payable, general ledger and payroll. Completed and submitted the interim and annual financial statements
- Led and participated in the implementation of two new integrated accounting software packages
- Established and implemented policies and procedures for credit, collections, disbursements, invoicing and related processes that increased productivity
- Directed and supervised of all cash management activities
- Negotiated customer, vendor and supplier agreements, utilizing departmental resources and inputs, to reach productive and cost-effective decisions. Met company needs while attaining strengthened relationships between company and external partners
- Collaborated with the President, managers and staff to develop company policies and procedures that resulted in greater acceptance and support of workforce
- Led individual employee development, which increased overall commitment and retention

EDUCATION & CREDENTIALS

Butler University

08/1989 - 05/1993

School of Business Administration

- Master of Business Administration

Indiana University

08/1983 - 05/1987

School of Business

- Bachelor of Science in Accounting



KAREN L. KINDER Project Manager

BACKGROUND

Ms. Kinder has more than 40 years of professional experience in government including leadership positions in human service agencies, developmental disabilities agencies, non-profit entities and private consulting firms.

Ms. Kinder has worked as a consultant with the Indiana Supreme Court writing grant applications and providing fiscal grants management for the Court. In addition to her work with the Indiana Supreme Court, Ms. Kinder has written a Grants Management Training curriculum and has provided training to numerous state and local governmental agencies nationwide for grants managers through the State Human Services Finance Officers (HSFo) association and through the National Grants Management Association (NGMA) during their annual national training conferences.

Ms. Kinder's areas of previous and current grant specialization include grants with the U.S. Department of Health and Human Services, U.S. Department of Labor, U.S. Department of Education, U.S. Department of Energy, U. S. Department of Transportation, and the U.S. Department of Justice

SKILLS & TECHNOLOGY

- Microsoft Excel
- Microsoft Word
- Microsoft PowerPoint
- Microsoft Outlook
- Microsoft Access

PROFESSIONAL EXPERIENCE

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|--|---------------|
| • Diversified Services Network Inc. (DSN)
<i>Sr. Consultant/ Grant Management</i> | 2019--Present |
| • Sequoia Consulting Group
<i>Chief Financial Officer/Director</i> | 2007--2019 |
| • Independent Residential Living of Central, Inc.
<i>Director of Finance/Chief Financial Officer</i> | 2005—2007 |
| • Family and Social Services Administration (FSSA)
<i>Director of Budget and Finance</i> | 2000--2005 |
| • Indiana Horse Racing Commission
<i>Controller</i> | 2000--2000 |
| • Family and Social Services Administration (FSSA).
<i>Director of Finance, Deputy Controller, Accountant</i> | 1977—2000 |
| • Merchants National Bank
<i>Checks Auditor</i> | 1974—1977 |





CONSULTING EXPERIENCE

INDIANA

Indiana Supreme Court Grants Management

- Under contract with the Indiana Supreme Court to seek out and write grant applications
- Manage the grant administration and reporting of current grants
- Provide technical assistance with the financial operation of the Judicial Technology and Automation Committee within the Indiana Supreme Court, Division of State Court Administration.

State Human Services Finance Officers (HSFo) and the National Grants Management Association (NGMA)

Grants Administration Training

- Included development of a training curriculum
- Providing training workshops to state agencies and local governmental agencies on seeking, writing, submitting and managing federal, state and local grants

State Agency Administration

Indiana Dept. of Family & Social Services - FSSA Director of Budget and Finance

- Responsible for the development and administration of policies and procedures to efficiently and accurately manage the \$6 billion in total annual resources of the agency and to assist with the financial planning for the various divisions within the agency as it related to the resources available and the service goals desired by the State.
- Managed a staff in excess of 200+ housed within 4 departments: Financial Management, Budget, Claims Management and Institutional Finance.
- Creation of and oversight for the implementation of the agency's cost allocation plans.
- Provided leadership and subject matter expertise for the agency's responsibility to oversee the relationship with sub-recipients, up to and including fiscal management and reimbursement auditing and approval, monitoring of sub-recipients performance as related to the contract deliverables and the outcomes required by the State Agency.

Indiana Dept. of Family & Social Services - FSSA Finance Manager

- Responsible for the complete financial function for the agency including the accounting for resources, payroll, procurement, personnel, accounts receivables, accounts payables and contract management.
- Responsible for the development and implementation of policies and procedures to efficiently and accurately account for all federal, state, and local finances of the agency including but not limited to accounts receivables, accounts payables, budgetary reporting, expenditure reporting, trend analysis and grants management.





- Responsible for the development and implementation of policies and procedures to efficiently and accurately account for all federal, state and local finances of the agency including but not limited to accounts receivables, accounts payables, budgetary reporting, expenditure reporting, trend analysis and grants management.

Indiana Dept. of Family & Social Services - FSSA
Director of Financial Management

- Developed and implemented a general ledger system, audited accounts for erroneous charges and expenditures, controlled balances and created audit and expense reports for management.

Non-Profit Administration

Independent Residential Living of Central Indiana, Inc.,
Chief Financial Officer

- Responsible for the total financial affairs of the agency, including, but not limited to, the creation and management of the \$6 million annual budget.
- Maintenance of the general ledger, management of accounts receivables, billables, and accounts payables, preparation of financial statements for the Board of Directors and internal management, cash and expense forecasting and property financing.

EDUCATION & CREDENTIALS

B.A. in Business Management; *St. Mary of the Woods College, Terre Haute, IN*





MICHAEL J. LENOX, CMA, CFM, CIA

Cost Allocation Plan Preparation and Management Specialist

BACKGROUND

Mr. Lenox brings more than 39 years of professional and progressive experience in accounting, financial and business management practices and procedures to the area of public sector and government accounting. His experience and qualifications provide a solid foundation in performing the tasks associated with compiling and analyzing the necessary figures associated with public assistant cost allocation plans (PACAP) and provider cost reporting.

Mr. Lenox holds certifications in Management Accounting (CMA), Financial Management (CFM) and Internal Auditing (CIA). His financial and accounting experience includes financial management with corporations with revenues of \$450 million and state agencies with expenditures of \$11.6 billion.

SKILLS & TECHNOLOGY

- Microsoft Office Suite (Microsoft Excel, Microsoft Word, Microsoft PowerPoint, Microsoft Outlook, Microsoft Access)
- DSNRMTS©
- DSNCAPS©
- SequoiaCAPS

PROFESSIONAL EXPERIENCE

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|---|---------------|
| • Diversified Services Network Inc. (DSN)
<i>Sr. Cost Analyst</i> | 2019--Present |
| • Sequoia Consulting Group
<i>Sr. Cost Analyst</i> | 2007--2019 |
| • Guide Corporation, Inc.
<i>Corporate Senior Financial Analyst</i> | 2002--2007 |
| • Casting Technology Company
<i>Cost and Budget Manager</i> | 1997-2001 |
| • Cambridge Industries/GenCorp.
<i>Division Pricing Analyst and Cost Manager</i> | 1988-1997 |
| • GenCorp
<i>Cost Accountant, General Accountant</i> | 1984--1988 |
| • John E Barry, CPA
<i>Staff Accountant</i> | 1982-1984 |

CONSULTING EXPERIENCE





Cost Allocation

State of Indiana, Department of Child Support Programs (DCS) and Family and Social Services Administration (FSSA)

Senior Cost Analyst

- Analyzes statistical and financial data associated with compilation of Public Assistance Cost Allocation Plans
- Working extensively with state employees in identifying, retrieving and analyzing data from available financial systems
- Developing Excel models to allocate FSSA costs and prepare plans in accordance with the reporting standards 2 CFR Part 200 – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Grants, Generally Accepted Accounting Principles (GAAP), and other State and Federal policies and procedures
- Involved in development and testing of proprietary cost allocation program CAP, which allows clients to fully utilize the cost-sharing aspects of Federal programs that serve the general public.

Indirect Cost Rates

State of Louisiana, Louisiana Department of Public Safety, Office of Juvenile Justice, Indirect Cost Plan

Senior Cost Analyst

- Analyzes statistical and financial information for preparation of Annual Indirect Cost Plan and Rates
- Works with state employees in identifying, retrieving and analyzing data from available financial systems
- Use CAP program or other Excel program to provide Indirect Cost Plan, resubmitted SFY 2008 Indirect Cost Plan due to irregularities found in submission.

Indirect Cost Rates

State of Indiana, Indiana Department of Correction (IDOC)

Senior Cost Analyst

- Analyzed statistical and financial information for preparation of Annual Indirect Cost Plan and Rate
- Worked with state employees in identifying, retrieving and analyzing data from available financial systems
- Provided Indirect Cost Plan and Rate for the Grants Administrative function of IDOC using a CAP's program and Excel program

Indirect Cost Rates

Knox County, TN

Senior Cost Analyst

- Analyzed statistical and financial information for preparation of Annual Indirect Cost Plan and Rate
- Worked with county employees in identifying, retrieving and analyzing data from available financial systems,
- Used CAP's program to provide Indirect Cost Plan and Rates.

Indirect Cost Rates





Horry County, SC

Senior Cost Analyst

- Analyzed statistical and financial information for preparation of Annual Indirect Cost Plan and Rate
- Worked with county employees in identifying, retrieving and analyzing data from available financial systems
- Used proprietary CAP's program to provide Indirect Cost Plan and Rates.

Indiana Private Sector

Corporate Senior Financial Analyst

2002 – 2007

- Provided financial and management support to Chief Financial Officer, Corporate Controller, corporate management teams and operational facilities,
- Responsibilities included annual budget and monthly forecasting processes incorporating sales, standard costs, Corporate Sales, General & Administrative (SG&A) costs and plant operation expenses, including analysis of variances from prior year, budget and forecasts.
- Responsible for publishing monthly corporate financial statements and management reports, developed and maintained monthly model for tracking Manufacturing Operating Statistics to track plant and corporate goals and the development of a financial system incorporating cash forecasting and tracking,
- Analysis and reconciliation trained new hires to ensure accuracy of work and maintenance of corporate, state and federal accounting standards and regulations.

Indiana Private Sector

Finance Department

Costs & Budget Manager

- Facilitated \$40 million-dollar joint venture with a Japanese company, serving twice as interim controller
- Responsible for completion of annual business plan, monthly and quarterly forecasts, calculations for new business quotes, and period closing activities and updates, helped develop new business and financial goals and track associated performance metrics
- Involved with successful implementation of the Oracle system software, worked with Controller and corporate business partners to set, meet and maintain goals, providing company with progressive financial foundation.

Indiana Private Sector

Division Pricing

Analyst/Cost Manager/General Accountant

- Responsible for design, implementation and maintenance of manufacturing and financial systems, Manman and Software International
- Managed all costing functions, including annual standards and inventory analysis, the annual operating plan and updates and short- and long-term forecasting financials
- Developed procedures to fairly allocate burden spending to product lines, trained Financial Development Program employees, teaching them to how to access and analyze data retrieved from computer systems, and providing them with guidance and experience to become future financial managers within GenCorp.





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- Performed all general ledger account activities and analyses, reconciliation of fixed assets, performed / maintained payroll and account posting and reconciliations, audit functions
 - Responsible for the preparation / analysis of monthly financial statements

EDUCATION & CREDENTIALS

Master of Business Administration; *Grand Valley State University; Allendale, MI*

Bachelor of Science; Accounting; *Findlay College; Findlay, OH*





KIMBERLY MCCLAUGHRY

Cost Allocation Specialist Support/ RMS Specialist

BACKGROUND

Ms. McClaughry has five (5) years of experience in the human services area. Ms. McClaughry's expertise encompasses cost allocation and conducting random moment time studies for the State of Indiana, specifically with the FSSA. Her background also includes expertise in federal claiming, adoption and guardianship subsidies review, Title IV-E federal requirement review and general child welfare consulting.

SKILLS & TECHNOLOGY

- Microsoft Excel
- Microsoft Word
- Microsoft PowerPoint
- Microsoft Outlook
- Microsoft Access
- Cost Allocation Plans
- Google Services
- Adobe Services (Photoshop, Acrobat, Illustrator, InDesign, Lightroom)
- Illinois DCFS Systems (Mainframe, SACWIS, RMS software)
- DSN RMTS®

PROFESSIONAL EXPERIENCE

Financial Claiming Consultant

7/2022 to Present

Diversified Services Network, Inc., Brownsburg, IN

- Enters data upon receipt into organized spreadsheets in order to help claim federal funds through the allocation of various costs
- Uses the data received to produce percentages, organized into spreadsheets
- Updates Public Assistance Cost Allocation Plan information for Family and Social Services Administration, quarterly
- Reviews information for discrepancies from prior quarters/ years
- Organizes data into spreadsheets specifically for the CAP program
- Run numbers through CAP Program
- Assemble and review reports ran through the CAP program
- Updates spreadsheet for results from the Random Moment Study for current contracts, quarterly

Subsidy Review Team Lead/ Child Welfare Consultant

8/2019 to 6/2022

Diversified Services Network, Inc., Springfield, IL

Member of consulting team, working with Illinois Department of Children and Family Services (DCFS)





Subsidy Review Team Lead

- Lead a team of workers who review all Adoption and Guardianship subsidies for Illinois for Federal compliance
- Facilitated trainings over title IV-E Federal requirements
- Reviewed policy guides, Federal and State laws, and acts to ensure we had the most up-to-date practices for the department
- Communicated extensively with the DCFS Subsidy Supervisors and case workers via email and phone
- Generated and reviewed monthly reports for Subsidy Tracking System
- Ran and reviewed monthly discrepancy reports and contacted the field to rectify any issues
- Reviews incoming files for discrepancies, as needed
- Performed Quality Control checks for incoming files, as needed
- Facilitated daily meetings with the team

Child Welfare Consultant

- Data entered all responses from case workers in regards to on-going foster care requirements
- Finalized the reports monthly for on-going foster care
- Data entered all Permanency, Adjudication, and Dispositional Hearings sent on the DCFS Mainframe
- Participated in all the monthly mock audits
- Participated in the hiring process, as needed
- Updated all existing training material, as needed

EDUCATION & CREDENTIALS

Masters of Business Administration

Grand Canyon University, Phoenix, AZ

2021

Bachelors of Art - Studio Art

University of Saint Francis, Fort Wayne, IN

2018





JESSE BRATTON

Cost Allocation Specialist Support

BACKGROUND

Jesse Bratton is a Senior Advisor with over 14 years of combined experience organizing and directing the operational and fiscal functions within state government finance, as well as cost allocation plans in his current career with DSN and former career with the State of Oklahoma. Mr. Bratton provides technical expertise for DSN projects which include cost allocation and random moment time studies. Mr. Bratton works with states across the country to develop, implement, and maintain public assistance cost allocation plans (PACAPs), time studies, and supporting practices.

Prior to joining DSN, Mr. Bratton worked as the Finance and Operations Administrator with the Oklahoma Department of Human Services. During his career with the State of Oklahoma, Mr. Bratton was responsible for directing both the Operations and Accounts Payable divisions of the Finance Division, along with developing, refining and directing the use of the Agency's accounting systems, including the internal controls for those systems. Mr. Bratton also directed numerous expense and revenue funding streams, including forecasting, budgeting, reconciling, and reporting. Additionally, Mr. Bratton worked closely with the public assistance cost allocation plan and federal reporting. Mr. Bratton received his Bachelor of Science in Accounting from the University of Central Oklahoma.

SKILLS & TECHNOLOGY

- Microsoft Excel
- Microsoft Word
- Microsoft PowerPoint
- Microsoft Outlook
- Microsoft Access
- Cost Allocation Plans

PROFESSIONAL EXPERIENCE

Diversified Services Network (DSN)
Springfield, IL

July 2023 – Present

Project: Support and preparation of ISBE's Indirect Cost Rate Calculation.

- Provides technical expertise to ISBE to prepare the indirect cost rate allocation rate.
- This work involves reviewing organizational and other changes impacting the ISBE DICAP, preparing DICAP supporting documentation, reviewing allocation methods, reviewing and updating procedures, and assisting with negotiation of federal approval for the DICAP.





- This work includes researching and responding to questions on cost pools, allocation methods, time tracking, and federal negotiation questions.

Public Consulting Group
Boston, MA

October 2022 – June 2023

- Subject matter expert in public assistance cost allocation plans and administrative claiming
- Review, analyze and interpret complex state and federal regulations and regulations related to cost allocation, indirect cost rates, administrative claiming, and grant reporting.
- Provide guidance related to cost allocation for public assistance program funding streams, including Medicaid, the Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Title IV-E, and others as needed.
- Prepare, deliver, lead, or assist project manager with client presentations, including progress reports and project management artifacts.
- Contribute to proposal writing, including editing, reviewing, and writing.
- Manage tasks with limited supervision, while meeting and exceeding expectations.
- Provide direct collaborative assistance with regards to improving, updating and understanding the AlloCap and EasyRMTS systems to ensure proper financial data is available and reported accurately.

Oklahoma Department of Human Services
State of Oklahoma

Finance and Operations Administrator

July 2012 – October 202
June 2017 – October 2022

- Direct daily management of Accounts Payable and Finance Operation units.
- Develop, refine, and direct use of accounting systems and internal controls for those systems, including process manuals.
- Direct expense and revenue forecasts, expense budgets, reconciliations, performance metrics and accounting analyses.
- Assist with the evaluation of expenditures with the Cost Allocation unit to determine equitable distributions are maximized and reconciled.
- Supervise grant drawdown revenue and balancing.
- Coordinate audit responses and work with teams to meet operating goals.
- Manage, review, and approve monthly reconciliations.
- Oversee, review, and coordinate annual GAAP Reports.
- Instruct, motivate, and assess team members to ensure productivity and customer service standards are met.
- Identify and resolve issues and discrepancies.
- Streamline processes and procedures for improving operational efficiency of finance reporting and budgeting systems.
- Assistance was also provided in developing and implementing budget distribution lines, policy, and Statutes, as well as quality initiative improvements in all areas across the Agency.

Accomplishments:

- Successful transition from AS400 to PeopleSoft
- Designed and implemented Agency's employee travel reimbursement program.
 - Eliminated unnecessary travel reimbursement statutes.



- Led, designed, and implemented the Fleet Lease Project, which reduced agency travel reimbursement from \$10M per year to less than \$4M per year, which affected all agency employees (6K+) and included numerous training sessions and data analyses.
- Developed a plan to streamline and reduce agency liability through Trust Operations RFP
- Automated entry of accounts payable during CARES Act Funding
- Transition to a fully paperless environment
- Successful transition to telework environment for 100% of team

Comptroller III

July 2012 – June 2017

- Manage, compile, examine, interpret and reconcile the agencies approximately \$100 million in monthly receivable records for the financial report.
- Manage, compile, examine, interpret and reconcile the agencies approximately \$30 million in non-operational accounts for the monthly financial report.
- Agency's Audit liaison with the State Auditor & Inspector.
- Along with management, attend various audit meetings including entrances, status meetings, and exit conferences.
- Facilitate and communicate requests for information between financial auditors and all divisions within OKDHS; serve as point-of-contact regarding the overall audit process.
- Assist management with the review of and response to audit findings and recommendations, ensuring that responses are accurate, comprehensive, and accurately reflect the position of the Agency.
- Assist management in developing strategies for effective and efficient implementation of audit recommendations; Report to executive management the reasonableness of management's implementation plan and provide updates regarding the progress of the implementation.
- Assist management with the implementation of internal control and process improvements as requested.
- Extensive experience with settlement agreements. Managed the entire process of non-litigated settlement agreements for every division within OKDHS.
- Organize, compile, analyze and review the Agency's submission of annual GAAP packages to OMES.
- P-Card accountant/holder with responsibilities including, but not limited to, internal training and assisting the P-Card administrator to ensure users are maintaining the integrity of the purchase card program.
- At the request of OKDHS finance administrators, participated in several and led two interview panels, which resulted in the hiring of qualified participants for critical functions within the agency.
- Analyze, examine, and interpret agency budget and account records, compile financial information, and reconcile reports and financial data.
- Perform process analysis and communicate recommendations to management.
- Perform critical review of accounting transactions, leading to the processing of necessary journal entries to ensure accounting records are accurate.
- Extensive experience working with OKDHS program areas, and OKDHS finance units, including the Claims Processing Unit.



Oklahoma State Auditor & Inspector
State of Oklahoma
Auditor II

August 2009 – July 2012

- Performed various aspects of audit engagements as a member of an audit team.
 - Including working independently on audits
 - Also accepting additional responsibilities on complex audits
- Provide assistance to less experienced auditors
- Maintained knowledge of requirements for Single Audit, GAAP, GAAS, GAGAS.
- Maintained and enhanced proper grammar skills in both writing and speaking.
- Enhanced knowledge of financial statements, ledgers, journals, and computer technology.
- Analyzed accounting records.
- Demonstrated the ability to analyze business practices (i.e. internal controls) and prepare neat, concise, and relevant audit workpapers.
- Established and maintained relationships with audit team and audit client.
- Applied computer assisted audit technique to audit data using ACL.
- Assisted in the planning, performing, and review of audit work.

EDUCATION & CREDENTIALS

University of Central Oklahoma
BS in Accounting, May 2009

Edmond, OK

Oklahoma City Community College
AS in Business, May 2004

Oklahoma City, OK





AMY E. ROYCE

Cost Allocation Data Gathering Specialist/DSNRMTS Administrator

BACKGROUND

Ms. Royce has over twenty years of public sector consulting experience. She has been directly involved in a variety of operational and consulting engagements in the area of public assistance and child welfare reporting, claiming and compliance. Areas of specialization include random moment time studies, public assistance cost allocation services, and Supplemental Security Income advocacy.

Ms. Amy Royce joined DSN in 2019 and brought with her expertise in the cost allocation planning process and the development of RMTS systems. She is the subject matter experts with the operation and development of DSNRMTS© reporting, public assistance cost allocation plan development, preparing quarterly and annual plan updates, and the analysis of financial and statistical data.

Ms. Royce has been RMS Administrator who has worked with FSSA's Income Maintenance RMS, BDDS RMS and First Steps RMS. Other RMS project work includes operation of Louisiana Office of Juvenile Justice RMS and supporting DSNRMTS© operations in Clark County Nevada, Iowa, Kansas and Illinois.

Ms. Royce assisted with implementation and training for District of Columbia's revisions to their child welfare RMS and development and implementation of the Child Placing Agency RMS.

SKILLS & TECHNOLOGY

- Microsoft Office Suite (Microsoft Excel, Microsoft Word, Microsoft PowerPoint, Microsoft Outlook, Microsoft Access)
- DSNRMTS©

PROFESSIONAL EXPERIENCE

- | | |
|--|---------------|
| • Diversified Services Network Inc. (DSN)
<i>Sr. Consultant</i> | 2019--Present |
| • Sequoia Consulting Group
<i>Consultant</i> | 2004--2019 |
| • MAXIMUS, Inc.
<i>Contract Employee</i> | 2002--2004 |
| • Bunger and Robertson
<i>Senior Litigation Secretary</i> | 2000--2002 |





CONSULTING EXPERIENCE

Cost Allocation

Indiana Family and Social Services Administration (FSSA) Public Assistance Cost Allocation Plan (PACAP) Project

Cost Allocation Specialist

- Assisted in developing, implementing and amending PACAP
- Assisted with preparation of administrative cost flow report documenting processes and procedures used by the project.

Cost Allocation

Indiana Department of Child Services (DCS) Public Assistance Cost Allocation Plan (PACAP) Project

Cost Allocation Specialist

- Assisted in developing, implementing and amending PACAP.

Random Moment Sampling System

Indiana Family and Social Services Administration (FSSA) Random Moment Sampling Administration

RMTS Administrator

- Assisted in RMTS startup process
- Conduct staff training, developed process manuals and user guide, directs RMS staff in e-mail sampling utilizing DSN's proprietary DSNRMTS© software application, directs client contact in reporting;
- Perform matrix maintenance and updating
- Provides user manual updating
- Continues on-going client and staff support and testing of DSNRMTS© enhancements, directs daily and quarterly reports.

Random Moment Sampling System

South Carolina Department of Social Services (DSS) Random Moment Sampling Administration

RMTS Administrator

- Assisted in RMS startup process
- Conducted staff training, directs RMS staff in e-mail sampling utilizing RMTS software application, directs client contact in reporting
- Performed matrix maintenance and updating
- Created and directs daily and quarterly reports.

Random Moment Sampling System

District of Columbia, Child and Family Services Agency

RMTS Administrator





- Developed and presented Random Moment Sampling Time Study training to Child and Family Services Agency and Child Placement Agency staff,
- Administered first quarter of e-mail sampling
- Presented Random Moment Sampling Time Study training to Congregate Care staff.

Random Moment Sampling System

Indiana Department of Child Services (DCS) Random Moment Sampling Administration, RMTS Administrator

- Assisted in RMS startup process
- Conducted staff training, developed process manuals and used guide, directed RMS staff in telephone, e-mail and direct main sampling RMTS software application, directed client contact in reporting, matrix maintenance and updating, provides
- Worked on the RMTS' User Manual updating; ongoing client and staff support and testing of DSNRMTS© enhancements.

Supplemental Security Income (SSI) Advocate

Indiana Department of Child Services

- Responsible for SSI advocacy process for adult and minor wards of the State, process including screening referrals, preparing applications, coordinating with Social Security Administration (SSA) and Bureau of Disability Determination staff, and initiating subsequent appeal procedures for adverse decisions
- Notified SSA of payee changes or suspension of benefits, prepared and submitted Title II benefit application packages
- Developed Indiana Client System (ICES) and Indiana Child Welfare Information System (ICWIS) training manuals specific to the SSI process
- Maintained and enhanced existing project databases and training material, provided technical assistance to DCS Family Case Managers.

Random Moment Sampling System

Illinois Department of Children and Family Services (DCFS), Random Moment Sampling Software for Telephone Polling and Mailing

RMTS Administrator

- Assisted in implementation and transfer of Illinois DCFS RMS groups from previous contractor's software to new RMTS software which included importing employee data
- Cost allocation matrix, testing software on client's platform
- Transferring 2 years of RMTS data, and training State staff in RMS process and reporting features.

Random Moment Sampling System

Nevada Internet Random Moment Sampling Software, Clark County Department of Family Services (DFS)

RMTS Administrator

- Worked with DFS to transfer child welfare RMTS from previous contractor's software to new RMTS software



- Responsible for importing employee data; cost allocation matrix, testing software on client's platform
- Training staff on RMTS Email Generation functionality; enabled RMTS to move from manually mailed form RMTS to Email generated sampling and reporting process.

Random Moment Sampling

Kansas Department of Social and Rehabilitative Services (SRS), Intranet and Internet Random Moment Sampling Software

RMTS Administrator

- Assisted with RMTS customized implementation and ongoing technical support, support eligibility sample, child welfare sample and private agency sampling,
- Aided in transfer of samples from previous system to new RMTS software
- Prepared for transfer of 4 samples from prior period databases into RMTS, enabling State to access information for audit purposes.

Random Moment Sampling

Iowa Department of Human Services, Intranet Random Moment Employee Sampling Software

RMTS Administrator

- Assisted with customization of RMTS software, provide ongoing technical support to State staff.

Title IV-E Child Welfare

Indiana Central Eligibility Unit and Local Offices of Family and Children Title IV-E Federal Compliance Review

Case Reviewer

- Prepared programs for 2003 Indiana Federal Compliance Review, including performing case reviews to ensure appropriate determination of child's eligibility.

Title IV-E Child Welfare

State of Indiana Department of Child Services, IV-E Rate Establishment

Financial Consultant

- Assisted in calculation of Title IV-E Reimbursement Rates with on-site cost report reviews.

Business Process Review Efficiencies

Indiana Single Point of Entry Analysis (SPOE)

Consultant

- Evaluated efficiency of SPOE/LPCC clusters b developing/distributing a salary and benefit survey to determine if employee and contractor salaries are commensurate with their responsibilities
- Conducted staff training and data analysis of surveys determining time spent in various program areas
- Assisted in review of current business processed then presented outcomes and recommendations to State.

Rate Allocation Methodology



State of Indiana Family and Social Services Administration, Division of Disability and Rehabilitative Services (DDRS)

Project Manager

- Established a rate allocation methodology for First Steps, Indiana's early intervention program for infants and toddlers with disabilities
- Worked to develop and document equitable methodology to establish funding rates which will allocate funds to each of the nine (9) System Point of Entry Clusters based upon federal rules and regulations included in 2 CFR Part 25 (OMB Circular A-87).

EDUCATION & CREDENTIALS

B.A. Legal Studies, *Indiana University*





KIM KENNEDY (SUBCONTRACTOR) DSNRMTS Assistance Administrator, Data/Operation Analyst

BACKGROUND

Ms. Kennedy has several years of professional experience in government supporting State of Indiana Family and Social Services Administration (FSSA) operations related to federal funding.

Ms. Kennedy has been in the role of RMS Operation since 2016. She has supported FSSA's Income Maintenance RMS, BDDS RMTS and First Steps RMS. Other RMTS operation projects, that Ms. Kennedy is involved with includes the State of Louisiana Office of Juvenile Justice.

Ms. Kennedy's experience includes identifying and reviewing Title IV-E child welfare cases for compliance with federal and State policies. Her background has also required and contributed to recognized strengths in administrative, supervisory, research and analytical skills.

SKILLS & TECHNOLOGY

- Microsoft Excel
- Microsoft Word
- Microsoft PowerPoint
- Microsoft Outlook
- Microsoft Access
- DSNRMTS©

PROFESSIONAL EXPERIENCE

- | | |
|--|---------------|
| • Diversified Services Network Inc. (DSN)
<i>Sr. Consultant, Cost Allocation Services/RMTS Operations</i> | 2019--Present |
| • Sequoia Consulting Group
<i>Assistant Program Administrator/RMTS Operations</i> | 2016--2019 |
| • Accredo Specialty Pharmacy
<i>Prior Authorization/Eligibility Specialist</i> | 2016—2016 |
| • Xerox Corporation
<i>Customer Care Supervisor</i> | 2015--2015 |
| • Medicaid Eligibility & Denial Solutions (M.E.D.S.)
<i>Regional Manager</i> | 2005--2014 |
| • Family and Social Services Administration (FSSA).
<i>Office Manager and Hearing Officer's Coordinator</i> | 2002—2004 |
| • US Airways
<i>Team Leader</i> | 1978—2002 |

CONSULTING EXPERIENCE

State of Indiana





Family and Social Services Administration (FSSA)

RMTS Operations

Sr. Consultant, Cost Allocation Services

- Working reminders, validations and auditing responses for RMTS (time studies).
- The studied groups include FSSA and BDDS for the State of Indiana, Department of Social Services for South Carolina and the Office of Juvenile Justice for Louisiana.
- Assist with the process of updating the quarterly rosters for each employee group.
- Performs RMS day-to-day call center operations involving contact with selected staff in three agencies polled in Indiana: The Department of Family Resources (including contracted ACS, Arbor and Alpha Rae staff), the Bureau of Developmental Disabilities Services, and the FSSA First Steps Program.
- Perform RMS intranet and internet email processes to meet random moment sampling time study requirements for claiming in accordance with the Public Assistance Cost Allocation Plan and Federal guidelines.
- Daily contact with the local RMTS Coordinators in each location of the email-sampled agencies, including contact with ACS District and DFR Regional Managers as related to RMTS, including unanswered samples, discrepant sample responses and any changes to sampled staff lists or their contact information.

State of Indiana, FSSA Division of Hearings & Appeals

Office Manager and Hearings Officer's Coordinator,

- Responsibilities included the coordination of the hearing schedules for Administrative Law Judges in Northern Indiana
- Management of the procurement process for the administrative staff
- Preparation of hearing reports for the Hearings and Appeals Director
- Coordination of responses questions from appellant and other hearings participants.

Private Sector Client

Accredo Specialty Pharmacy

Prior Authorization/Eligibility Specialist

- Primary responsibilities are making outbound calls to Medical Doctor Offices obtaining prior authorization(s) for Specialty Medication.
- Detailed documentation was required in several systems.
- The pharmacy uses Avaya, TMW, ESD and Coverage 360 systems to work their accounts.

Xerox Corporation

Customer Care Supervisor

- This position was in a call center that was managed by the Xerox Corporation for Caresource.
- Handled inbound calls received from healthcare providers and insured members.
- My responsibilities included coaching team members in the area of customer service, time management and complaint resolution.

Medicaid Eligibility & Denial Solutions (M.E.D.S.)

Regional Manager



- Served as Project/Program manager for several high dollar value healthcare claims processing contracts for major healthcare networks located in Indianapolis, Indiana and surrounding counties.
- Worked with the following client including Community Health, Indianapolis Hancock County Regional and Hendricks County Hospitals, Indiana.
- Provided detailed and comprehensive knowledge of Medicaid policies and procedures and hospital claims and billing procedures.
- Primary responsibilities included the oversight of onsite Caseworkers and utilization reviews
- Compilation of information and preparation of reports including self-pay conversion, pending and approved account inventories, invoicing, and status update and closure reports
- Liaison to network Chief Financial Officers (CFO's)
- Coordination with State Medicaid Eligibility staff and facilitation of client and employee staff meetings.

US Airways

Reservations Sales Supervisor/Team Leader

- Responsibilities included development and coaching of sales representatives for improved performance
- participation in the recruitment of new employees utilizing the targeted selection process; tracking and analysis of performance measures to provide statistical feedback to team members; development of individual and team performance improvement plans with the Quality Assurance Specialist; facilitation of goal post meetings for training purposes; ensured compliance with company policies, procedures and practices by sales representatives; management of employee disciplinary action; and, representative of USAirways in unemployment hearings.
- Responsibilities included acceptance of in-bound telephone calls, delivery of efficient and friendly customer service with the objective of selling the USAirways travel products, often being recognized as a top sales performer.
- Responsibilities included resolution of customer complaints and employee concerns; provision of information and technical support to sales representatives; and, interpretation and explanation of company policies and procedures to passengers and team members.

EDUCATION & CREDENTIALS

State of Indiana, ACA Navigator Certification, *Pathfinder Education*;

IUPUI, Indianapolis, *HR certification (in process)*

Ball State University, Muncie, Indiana; *Secretarial School*

I.U.P.U.I., Indianapolis, Indiana; *Criminal Justice Major*

I.U.P.U.I., Indianapolis, Indiana; *Paralegal Certificate*

Developmental Management, Pittsburgh, Pennsylvania; *Interactive Management Certification*.



SUSAN M. KELLEY

DSNRMTS Assistance Administrator, Data/Operation Analyst

BACKGROUND

Ms. Kelley is directly responsible for supporting the current operation of DSN RMTS® for FSSA. Her efforts include importing & reconciling employee data; updating and verifying the cost allocation matrix; testing software updates; training staff on DSN RMTS® Email Generation functionality. Ms. Kelley is the main contact for random moment sampling daily tasks, roster updates for both the DFR's Income Maintenance (IM) and Division of Disability and Rehabilitative Services' (DDRS) Bureau of Disabilities Services (BDS) staff and is available for questions.

SKILLS & TECHNOLOGY

- Database and reporting analysis software experience
- Advanced Excel skills, including macro creation, Visual Basic coding, and complex formulas
- Experience with process analysis, streamlining, and automation projects
- Macro creation and coding using terminal emulation software
- Expert knowledge of Microsoft Office software, including Visio
- Proven leadership ability
- Resourcefulness and initiative when solving problems
- Extensive customer service experience
- Business writing skills
- Strong organizational and project management skills
- IT experience in a variety of environments and businesses
- DSNRMTS®

PROFESSIONAL EXPERIENCE

Diversified Services Network (DSN), RMS Analyst

November 2023 – present

- Call or email RMS system users to verify inputted data
- Analyze RMS responses and perform quality assurance checks
- Follow up with users as needed
- Validate sample data by email or telephone
- Run daily, weekly, monthly and quarterly reports

Resort Condominiums International, 2008 – 2022

Process Analyst / Reporting Analyst (2017 – 2022)

- Provided scheduled and ad hoc SAS reports as needed for internal and external customers
- Transformed code from SAS to Snowflake, including creating several Excel Visual Basic macros for all departments to update code and naming conventions



- Created Excel productivity tracking system for approximately 40 customer service agents, including weekly automated downloads, monthly progress reports, and yearly rankings of agents
- Utilized SAS reporting and Reflections terminal emulation macros to automate cancelling of approximately 6,000 user accounts quarterly
- Created and implemented systems using SAS, Reflections, and Excel to automate processing of about 15,000 enrollments per year for major customer
- Created Excel Visual Basic macros to automate user account cancels
- Created documentation for various processes as needed
- Utilized Visio to create project flow charts to facilitate macros and coding

Customer Accounts Specialist (2014 – 2017)

- Enrolled up to 100 new resort members per day in the US, Canadian, and Caribbean regions
- Processed enrollments from RCI website, adhering to a 24-hour turnaround as a departmental guideline
- Created and administered MS Access database to track enrollments more efficiently, using it to monitor data, update fields and tables, and create queries and reports as needed
- Cancelled accounts in legacy systems as received from resorts
- Trained other team members to utilize departmental software and learn policies and procedures

E-Commerce Specialist (2010 – 2014)

- Utilized Kana software and business writing skills to respond to members' requests via email
- Used knowledge of RCI proprietary systems and procedures to resolve members' issues regarding accounts, website operations, and general business practices
- Delivered fair compensation to members as required, relying on sound business judgment to account for complex and unique factors
- Provided customer service and technical support while supplying customer feedback to supervisors and website designers

Web Support Specialist (2009 – 2010)

- Assisted members with account administration, navigation, and online transactions on the company website
- Capitalized on general PC and web browser proficiency to resolve members' issues; appointed as temporary supervisor during select shifts
- Consistently met or exceeded targets for accuracy, talk time, schedule adherence, and attendance

Vacation Guide (2008 – 2009)

- Collaborated with standard members and members of specialty clubs to plan vacations and administer accounts

Infospherix,

2006 –2008

Customer Service Agent (Part-time)

- Used proprietary software to process park reservations and assist callers with navigating company website



S&R Resources

2004–2007

IT Accounts Payable Representative (Contractor), Freedom/Irwin Mortgage Corporate Office

- Tracked IT invoice payments using Microsoft Access and allocated billing to various departments
- Simplified payment sorting by department for 25 independent locations using advanced Microsoft Excel skills

Asset Management Specialist (Contractor), Freedom/Irwin Mortgage Corporate Office

- Managed leased inventory in more than 130 locations, enhancing equipment management with inventory counts and improved valuation methods
- Created and implemented processes and reporting methods to help organize, locate, and control inventory
- Increased the amount of leased assets returned or replaced on time by 81%

Configuration Technician (Contractor), Freedom/Irwin Mortgage Corporate Office

- Configured and installed PC's and laptops for new hires, backed up user data when replacing end-of-lease equipment, and provided troubleshooting for office staff

EDUCATION & CREDENTIALS

Purdue University

Bachelor of Science in Management

Keller Graduate School

Master of Information Systems Management (Database Concentration)





DEREK J. MOORE

IT Technical Advisor—*DSN RMTS®* Technical Support

BACKGROUND

Mr. Moore provided consulting and Information Technology (IT) services to public sector, private sector firms and school districts. His experience encompasses the creation of database applications, ground-up database design, and development of database web interfaces for public and private sector entities. He has also developed custom applications that import and incorporate many large Excel data files into client-specific reports.

Mr. Moore has extensive experience developing, supporting and maintaining *DSN RMTS®*. Mr. Moore has an in-depth knowledge of the FSSA's RMS needs. Mr. Moore has a BS in Computer Information System.

SKILLS & TECHNOLOGY

C#, Visual Basic, Visual Studio, ASP, MVC, HTML, Bootstrap, AJAX, SQL, JavaScript, Migrating SQL Server Databases and .Net Web Applications to Microsoft Azure's cloud solutions. Office 365 migration, using Exchange 365 with web and database applications, Adobe Dreamweaver, Adobe Photoshop, MS Access, MS Excel, SQL Server, Microsoft Reporting Services, and Crystal Reports, *DSN RMTS®*

PROFESSIONAL EXPERIENCE

- | | |
|---|---------------|
| • Diversified Services Network Inc. (DSN)
<i>Sr. Consultant</i> | 2019--Present |
| • Sequoia Consulting Group
<i>Consultant</i> | 2005--2019 |
| • Eli Lilly & Company
<i>IT Development/Support</i> | 2004 – 2005 |
| • Brownsburg Community School Corporation
<i>Webmaster (part-time)</i> | 2004 – 2005 |
| • Brownsburg Community School Corporation
<i>Webmaster and Building Tech</i> | 2003 – 2004 |
| • Caterpillar, Inc.
<i>IT Analyst</i> | 2000 – 2003 |

CONSULTING EXPERIENCE

Random Moment Sampling Systems

Hosted

June 2008 – Present

- Develops, supports, and maintains RMTS database applications websites for Indiana FSSA (Family and Social Services Administration), Louisiana Office of Juvenile Justice (OJJ), and Virginia Department of Behavioral Health & Developmental Services (BDHDS).





- In 2014, all Hosted applications were migrated to Windows Azure databases (SQL Server) and websites to improve security, service up-time, and accessibility.
- Illinois DCFS Medicaid RMTS was transitioned from self-hosted to Azure in 2016.
- South Carolina DSS RMTS was added in 2016. Upgrading web applications to be more mobile-friendly.

Cost Benefit Analysis - Indiana/DCS, Foster Care / Adoption Assistance Project, Cost Allocation and Penetration Rate Reporting

System Developer/Support

April 2008 – Present

- Developed the IV-E Part 1 Reporting System, which imports Foster Care Initial Expenditures, Waiver information, and current and retro Foster Care Adjustments.
- This system is used to generate the IV-E Part 1 Funding Analysis Report. He also supports the Indiana Penetration Rate Reporting database.

Cost Benefit Analysis - Indiana Department of Child Services (DCS), Adoption Assistance Management System

System Developer/Support

July 2009 – Present

- Developed a workflow management and tracking system for DCS Adoption Assistance children with potential to add additional programs.
- The system allows for multiple user functions – Employee, Supervisor, and Coordinator.
- Users can add/modify children, add/modify tasks, Supervisor Quality control, and view a variety of reports

Indirect Cost Rates, Claiming - Kansas Department of Corrections (DOC) Penetration Rate Calculation/IV-E Claiming

System Developer/Support

June 2009 – Present

- Assists with calculations by compiling Eligibility, Claiming, and Medicaid data for reporting.

Random Moment Sampling Systems - Nevada, Clark County Department of Family Services (DFS) Random Moment Sampling Software for E-mail/Intranet

System Developer/Support

July 2007 – Present

- Provides ongoing technical support and updates to State staff. Assisted with SQL Server 2012 database migration.

Random Moment Sampling Systems - Nevada, Clark County Department of Juvenile Justice Services (DJJS) Random Moment Sampling Software for E-mail/Intranet, System

Developer/Support

January 2010 – Present

- Setup and implemented the RMTS System in Clark County for RMTS, E-mail and Web Response Sampling, provides ongoing technical support and updates to State staff.
- Provides ongoing technical support and updates to State staff.



- Assisted with SQL Server 2012 database migration.

Random Moment Sampling Systems - Illinois Department of Children and Family Services (DCFS), Random Moment Sampling Software for Telephone Polling and Mailing, System

Developer/Support

June 2008 – Present

- Implemented *RMTS* for DCFS using phone polling and paper sampling, project included importing employee data, cost allocation matrix, testing software on client's platform, transferring 2 years *RMTS* data, and training State staff on *RMTS* process and reporting, developed Custom Reports to interface with proprietary DCFS Reporting System, provides ongoing technical support and updates to State staff.
- Assisted with SQL Server 2012 database migration.
- Transitioned Illinois Medicaid *RMTS* Database to run Azure server.

Random Moment Sampling Systems - Iowa Department of Human Services (DHS), Random Moment Sampling Software for E-mail/Intranet

System Developer/Support

July 2007 – Present

- Assisted with implementation and customization of *RMTS* software, provides ongoing technical support and updates to State staff.
- Assisted with SQL Server 2012 and Windows Server 2012 migration.

Random Moment Sampling Systems - Kansas Department of Children and Families (DCF), Random Moment Sampling Software for E-mail/Intranet/Internet

System Developer/Support

July 2007 – Present

- Assisted with implementation, customization and ongoing technical support of *RMTS* software, developed archived *RMTS* for Kansas's historical data to reduce the processing load on their current production database, transferred historical data into *RMTS*, enabling State to access information for audit purposes, provides ongoing technical support and updates to State staff.
- Kansas DCF added an additional *RMTS* Group – Child Placement Agencies. Assisted with SQL Server 2012 database and Windows Server 2012 migration from SQL Server 2000 and Windows Server 2003.

Missouri/DSS, Claiming Database

System Developer/Support

July 2011 – October 2011

- Developed Claiming System in C#.Net with a SQL Server 2005 backend.
- The system was used to track and reconcile HPRP Claims (Homelessness Prevention and Rapid Re-Housing Program).
- The system generated reports in Excel format.



Indirect Cost Rates, Claiming - Indiana Department of Child Services (DCS) - Collaboration with DCS on Web-Based Penetration Rate Application

System Developer

May 2010 – August 2010

- Designed and helped implement Penetration Rate system working with a DCS Web Application Developer.
- System was made in ASP.Net (C#) with a SQL Server 2005 back-end.

Cost Benefit Analysis – Title IV-E Child Welfare - Indiana/DCS, Foster Care,

System Developer/Support

July 2006 – March 2009

- Processed 16,000+ foster care transactions per month for the Child Welfare Claiming System (CWCS) to be used for Federal Reimbursement and received claims from the ICWIS Schedule of Payments and Indiana's Statewide Claiming System, KidTraks.

Cost Benefit Analysis – Title IV-E Child Welfare - Indiana/DCS, Foster Care Claiming,

System Support

April 2005 – June 2006

- Provided development and support services for the maintaining of the Foster Care claiming and reporting Access database used for capturing data and compiling Federal Reports for claiming and reconciliation.

Cost Benefit Analysis - Indiana/DCS, Foster Care Claiming

System Support

April 2005 – June 2006

- Provided development and support services for the maintaining of the Foster Care claiming and reporting Access database used for capturing data and compiling Federal Reports for claiming and reconciliation.

Cost Benefit Analysis - Indiana/DCS, Adoption Assistance

System Developer/Support

May 2005 – April 2009

- Provided development and support services for creation of Adoption Assistance claiming and reporting Access database used for capturing data and compiling Federal Reports for claiming and reconciliation.

EDUCATION & CREDENTIALS

- B.S., *Computer Information Systems, Bradley University*
- A+ Certification
- CIW Professional Certification (Certified Internet Webmaster)
- CIW JavaScript Certification





DIVYA DUGYALA

IT Technical Advisor—*DSN RMTS*® Technical Support

BACKGROUND

Ms. Dugyala is an experienced software developer who has several years working on software supporting state government in education, child welfare, and human services area. Ms. Dugyala has hands-on experience providing updates to the State of Illinois Claim Analysis & Reporting System (CARS) using .NET, .Net Framework, XML, HTML, C#.Net, Visual Studio, TFS, JavaScript, ASP.Net, SQL Server, SQL Reporting Services.

Ms. Dugyala is able to provide support to Mr. Moore with troubleshooting and updating *DSN RMTS*® hosted in Azure.

SKILLS & TECHNOLOGY

Programming Language	C# .NET(6.0/5.0/4.5/4.0/3.5/3.0) ,VB .NET(14.0/10.0/9.0/8.0), T-SQL, PL/SQL
Web Technologies	ASP.NET(4.6/4.5/4.0/3.5/3.0/2.0),ASP.NETMVC(5.0/4.0/3.0),Ajax,JavaScript, JQuery(3.0/2.0/1.0),EntityFramework(6.0/5.0/4.0),Bootstarp,LINQ, WebAPI, Angular JS(4/2.0/1.5/1.6)., HTML5, CSS3, XML,Angular
IDE Tools	<ul style="list-style-type: none">Visual Studio 2015/2012/2010/2008/2019/2022, SQL Server Management Studio, Visual Studio Code
.NET Frameworks	<ul style="list-style-type: none">Net Framework (4.6.2/3.5/2.0), .Net Core(5.0,6.0)
Databases	MS SQL SERVER 2016/2014/2012/2008/2017/2018
Reporting Tool	Sql Server Reporting Services (SSRS 2008), Sql Server Integration Services (SSIS)
Version Control Tools	Team Foundation Server 2010/2008,Git
Middleware	WCF, Web API,MSMQ, Web Services, ADO.NET Entity Framework 6.0/4.1, LINQ, LINQ to ENTITIES, T-SQL
Servers	Microsoft IIS(7.0/6.0/5.0)
Cloud	Microsoft Azure

PROFESSIONAL EXPERIENCE

Diversified Services Network Inc. (DSN)

Illinois Department of Children and Family Services, Springfield, Illinois (04/19/2022- Current)

- Worked in Agile Scrum methodology and delivered accepted functionality in each sprint.
- Developed Business Tier using C# to implement classes and methods for business logic.
- Designed, developed , and enhanced the applications using .NET Framework 4.6, .NET Core 5.0,6.0, Web API and MVC.
- Developed UI using Angular, Typescript, jQuery, HTML5, Bootstrap, and CSS3.
- Provided database connectivity using Entity Framework, Entity Framework Core, LINQ, designed stored procedures, functions and views at the back end.
- Wrote various stored procedures, functions, views to access data from SQL databases.



- Used the Ninject for Dependency Injection to build a loosely coupled system.
- Used Repository and Factory design pattern to develop reusable code.
- Designed Unit testing module with NUnit to test the application performance and availability.
- Used Microsoft Azure for deploying and hosting web applications.
- Designed reports using SSRS, DevExpress.

Illinois State Board of Education, Springfield, Illinois (02/14/2022- 04/15/2022)

- Developed and maintained web applications using ASP.Net, C# with Agile/SCRUM methodology.
- Implemented the data access layer using Entity framework code first approach.
- Developed Razor views with strongly typed view models, helpers and partial views using ASP.NET MVC and improved layout with HTML5, Bootstrap, and CSS3.
- Effectively used jQuery and JavaScript for Client-Side Validations and bind, pull data from UI to models to perform data manipulations.
- Designed Unit testing module with NUnit to test the application performance and availability.
- Designed reports using SSRS.

Protech solutions Inc., Little Rock, Arkansas (07/16/2019 - 02/11/2022)
Palmetto automated child support system, Sc Thrive

- Developed web-based application using MVC patterns.
- Implemented WEB API controllers for all incoming requests to the controllers.
- Created Stored Procedures, views and functions in SQL Server and Extensively Involved in creating Triggers and indexes in SQL Server.
- Worked with JSON Data type in MS SQL Server, for inserting the JSON Data to tables using stored procedures
- Coding and implementation of various utilities and data access classes using Entity Framework.
- Created UI elements using HTML, CSS, JavaScript and jQuery.
- Involved in creating Test Driven Development (TDD) using NUnit.
- Used LINQ to manipulate and fetch the data from database.
- Involved in creating APIs to communicate the GLUU for user authentication validation OAuth2.
- Involved in creating external API controller request for creating meeting rooms (WEB RTC) for users and own cloud Data for file uploading/downloading.
- Used MSMQ for pushing posts such as messages/referral/actions.
- Involved in Agile development and testing in SCRUM framework.
- Document business requirements according to established department standards.
- Identified and gathered business goals and requirements from user community; analyzed and translated customer business requirements into technical requirements and functional specifications for system design and implementation.
- Wrote Test Cases, performed UAT, and reported the bugs and other open issues in TFS. Worked closely with the team to rely on improvements and shortcomings.

Graduate Teaching Assistant (02/01/2018 to 12/05/2019)
University of Arkansas at Little Rock, Little Rock, Arkansas

- Responsible for performing teaching to assist the professor.
- Monitor exams, grade homework and tests.



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- Assigns material in class as needed. Assisted in courses like Language Structures, Internet Technologies, Computer Systems, Database concepts.

EDUCATION & CREDENTIALS

Master of Science: Computer and Information Sciences, 2019
University of Arkansas at Little Rock

Bachelor of Technology: Computer Science, 2017
Kakatiya University, India





BIRDELL W. FRY, CPA Technical Advisor—Claiming and Policies

BACKGROUND

Mr. Fry brings over thirty years of experience in child welfare operations, specifically with a focus on federal program eligibility and claiming. Twenty-one years have been spent providing services to the Illinois Department of Children and Family Services. Mr. Fry is currently the Project Director of the IL DCFS Revenue Enhancement Project. This project is geared towards maximizing and protecting the Department's federal reimbursements as well as reducing costs. Mr. Fry will enhance this project by providing insight into the capabilities and overall functions of the Department systems and management personnel.

Mr. Fry was engaged in and directly managed a wide variety of organizational, operational, managerial, and financial consulting engagements for state and local governments with a focus on maximizing and protecting federal reimbursements and reducing costs. For the past twenty years, Mr. Fry's project focus has been on Child Welfare operations including federal program eligibility and claiming. He has worked with the respective child welfare departments in Illinois, Missouri, Indiana, Georgia, and Nevada.

SKILLS & TECHNOLOGY

- Microsoft Office Suite (Microsoft Excel, Microsoft Word, Microsoft PowerPoint, Microsoft Outlook, Microsoft Access)
- MARS/CYSIS
- SACWIS
- SequoiaCARS
- Subsidy Tracking System (web-based application)

PROFESSIONAL EXPERIENCE

- | | |
|---|---------------|
| • Diversified Services Network Inc. (DSN)
<i>Director</i> | 2019--Present |
| • Sequoia Consulting Group
<i>Director</i> | 2007--2019 |
| • MAXIMUS, Inc.
<i>Project Director</i> | 1996--2007 |
| • Management Systems of Illinois
<i>Health and Human Services Consultant</i> | 1993--1996 |
| • State of Missouri, State Auditor's Office
<i>Auditor</i> | 1986--1993 |

CONSULTING EXPERIENCE





Illinois Revenue Enhancement Project

Mr. Fry currently serves as the Revenue enhancement Project Director for the Illinois Department of Children and Family Services (DCFS) revenue enhancement project. Partnering with DCFS, his mutual achievements include the following:

- Implementation of eligibility process and claiming for Older wards (age 18-21) as a result of the Fostering Connections Act.
- Implementation of the Guardianship Assistance Program (known as KinGAP in Illinois) thanks to the Fostering Connections Act as well as the Subsidized Guardianship Title IV-E Demonstration Waiver that helped to pave the way.
- Expanded Title IV-E Foster Care to youth served by county juvenile probation departments.
- Conducted a comprehensive institution, group home, and specialized foster care rate study to determine overall Title IV-E claiming ability and updated the study annually in response to an OIG inquiry. Successful implementation of the rate study allowed DCFS to avoid any resultant disallowances.
- Maintained and supervised maintenance of the Department's Public Assistance Cost Allocation Plan (PACAP).
- Assisted in the implementation of Title IV-E Foster Care claiming for Juvenile Probation clients in multiple Illinois counties.
- Assisted the DCFS in passing both their primary Title IV-E Foster Care eligibility reviews to ensure ongoing compliance.
- Assisted in the clean-up of court documentation to ensure DCFS had adequate support for both initial court orders and ongoing permanency orders.
- Defended DCFS against audits conducted by DHHS-ACF-OIG Office of Audit Services. These audits examined DCFS' Title IV-E claiming of institution and group home costs and all of DCFS' Title IV-A Emergency Assistance claiming. These reviews led to zero disallowed costs.
- Developed strategies to reduce a \$7 million negative claim adjustment resulting from the Department's incorrect claiming of for-profit child placing agencies under Title IV-E Foster Care, to \$3 million.
- Annually explained and defended DCFS' claiming practice and claim preparation process to the A-133 Single Auditors resulting in minimal questioned costs.
- Annually prepared A-133 Subrecipient notification reports to all DCFS contracted service providers and responded to all related service contract federal claiming.
- Developed and implemented program and fiscal strategies to maximize State human service resources and leverage increased Federal entitlement funding under Title IV-A (AFDC), Title IV-E (Foster Care and Adoption Assistance), and Title XIX (Medicaid).
- Prepared Federal claims and budget projections for Title IV-E Foster Care and Adoption Assistance; TANF-Emergency Assistance; and IV-B Parts I & II, XIX, XX, Title XIX, Chafee and ETV.
- Completed a comprehensive review and analysis of service contracts not currently federally claimed; performed ongoing reviews of any newly added service contracts to identify additional federal claiming potential which led to several million dollars of additional claiming annually. The reviews also identified poor payment practice that once corrected not only provided additional federal claiming, but also better data for monitoring.
- Developed revenue protection strategies to preserve receipts threatened by Federal disallowances or changes in Federal policy.
- Reviewed and analyzed the Department's Federal claiming process and improved federal



receipts management reporting.

- Assisted the Department in the implementation and ongoing Federal claiming of the Subsidized Guardianship, Alcohol and Other Drug and Training Title IV-E, demonstration waiver projects and aided other states at the request of ACF, on how to establish a valid cost neutrality calculation process for demonstration waivers.
- Implemented the RMS phone polling for DCFS and Private Agency Caseworkers leading to significant increases in administrative costs claiming.
- Implemented documentation strategy to support and improve foster care candidacy claiming for DCFS in-home cases.
- Assisted in the management of the Department and private agency Case Manager time studies on an ongoing basis.
- Collaborated in systems planning, development and maintenance as well as research planning.
- Designed and developed the TANF (Title IV-A) Emergency Assistance Claiming program.
- Served as a liaison between IT programming staff and Department end-users.
- Developed several client-based applications in dBase, IV, Access and Visual Basic.Net and coordinated the complete automation of Title IV-E, TANK-EA, and IV-B claim preparation process which incorporates full automation of claim preparation with maintenance of the PACAP referred to as TFEDS.
- Implemented measures to document Title IV-E Foster Care Candidacy to fully comply with PA-01-02 by utilizing phone polling questions in the RMS and case plan language changes in conjunction with auditing case records and Caseworker training.
- Assisted with implementation and redesign for Foster Care Performance contracting.
- Served as the Department SME for the financial and fiscal components that would be included in SACWIS. Note: due to lack of funds, additional SACWIS development ceased and the financial components have not been incorporated.

Indiana Revenue Enhancement & Protection

Mr. Fry served as one of the managers over the Indiana Department of Child Services Revenue Enhancement, Projection and Cost Allocation project. In that role, his primary achievements include the following:

- Serving as SME for the ICWIS Redesign (SACWIS system) primarily for the development of the Centralized Eligibility Unit and fiscal and programmatic interfaces.
- Serving on the design team for the development of Kid Traks – a DCS statewide payment and claiming system that directly interfaces with ICWIS and State accounting system.
- Preparation of and training for IV-E Adoption Assistance including review and updating of current policies, practices and for RMS used.
- Preparation of the annual APDU and SARR for the ICWIS Redesign project.
- Reviewed Title IV-E rate setting process making several recommendations to improve federal recoveries.
- Assisted in provider audits and Title IV-E rate setting as a follow-up to Federal Department of Human Services – Office of Inspector General findings.

Nevada Federal Recovery Opportunities

Mr. Fry conducted a review of Nevada Division of Child and Family Services federal claiming practices to determine if there was any opportunity to improve recoveries resulting in multiple recommendations for DCFS' consideration.

Missouri Revenue Maximization MSA

Mr. Fry served as both project manager and project director of the Missouri revenue maximization MSA from 2004 through January 2007 and again in 2008 – current, working with the Department of Social Services and Department of Health and Senior Services. His achievements include the following:

- 2012 served as Project Director for the Missouri Department of Health and Senior Services CHIP H.S.I. for Local Public Health Agencies (LPHAs) project. Missouri was not taking full advantage of the administrative claiming portion eligible under CHIP which allowed Sequoia to work with the 115 statewide LPHAs to generate one-time federal reimbursement of \$6.49 million and ongoing annual potential of approximately \$5 million. These funds are being used to support local child programs including Lead Poisoning Prevention, Childhood Immunizations, School Health Education and Newborn Home Visiting. This occurred at an opportune time when the Missouri Legislature had reduced LPHA state funding by \$2.5 million.
- Provided guidance to Missouri Department of Social Services – Children's Division (CD) on the potential of implementing a subsidized guardianship waiver and a waiver that would focus on proving the benefits of expanded services to chronic child neglect cases. Due to budgetary concerns, neither waiver was implemented.
- Participated in the establishment costs-based rates for residential childcare providers that improves both reimbursement to the providers and maximizes the potential federal recoveries for the State.
- Participated in the residential contract restructuring workgroup advising both the state and providers of Medicaid and Title IV-E claiming implication of all the options they were considering.
- Worked with Missouri CD to develop the claiming approach for performance-based contract payments made to the seven PBC providers to provide full case management and placement and developed the data exchange with the PBC's to create the necessary detail placement transactions for federal claiming.
- Assisted the CD in preparing for and passing their 2006 Federal Title IV-E Foster Care eligibility review.
- In response to concerns raised by DHSS-CAS regarding the high percentage of non-responses, advised the CD on other options to consider enhancing their current RMTS e-mail system. The primary change they will implement on a pilot basis is phone polling of the quality assurance moments and phone follow up on all moments not responded to within 24 hours.

Missouri Cost Reporting and Rate Studies Development MSA

Mr. Fry served as project director for the Missouri Department of Health and Senior Services LPHA WAN Cost Allocation Project in 2013. DHSS Division of Cost Allocation was not satisfied with Missouri's proposed allocation methodology of WAN cost to the LPHAs. Sequoia, working with DHSS staff, developed an approvable methodology to allocate and claim those costs.

New Jersey Revenue Maximization



Mr. Fry worked with the Department of Human Services – Division of Youth and Family Services (DYFS) in a senior consultant capacity to advise them on several federal claiming issues.

- Advised DYSF staff how to modify administrative costs claiming to allow the State to Title IV-E for in-home foster care candidates. Detailed case analysis revealed Case Workers were unnecessarily keeping cases open longer than necessary without providing services, resulting in artificially inflated caseload numbers. These findings resulting in practice changes.
- Advised DYCS in their response back to OIG regarding how costs associated with employment agreements were being claimed as enhanced training.

Maine Revenue Enhancement

Mr. Fry rewrote the Department of Human Services, Revenue Enhancement Project cost allocation plan focusing on the Child Welfare Services Bureau to maximize Title IV-E recoveries. As a result of this work, an excess of \$1.2 million in new Case Worker salaries eligible for Enhanced Training claiming was discovered and the claims processed.

Georgia Revenue Enhancement

In July 2007, Mr. Fry, from fiscal perspective, was invited and participated in a DHS panel discussion to address many issues facing the child welfare agency. From that discussion, Mr. Fry provided DHS eight points to consider improving IV-E eligibility or federal recoveries – all were adopted.

Mr. Fry conducted Title IV-E case file reviews to identify cases that were incorrectly identified as Title IV-E ineligible. In Fulton County, a third of the cases were found to be incorrect.

Arizona Title IV-E Demonstration Consultation

Consulted with the state on how to step up their demonstration waiver and calculate ongoing cost neutrality.

Department Redesign Project

Mr. Fry conducted an analysis of the Department of Human Services' federal claiming systems to determine a consolidated approach to claiming Department wide.

Colorado Revenue Protection Project

To protect and enhance Title IV-E recoveries, Mr. Fry assisted in statewide training of casework staff on the correct use of Social Service random moment time studies.

Tennessee and Wisconsin Title IV-E Demonstration Consultation

In conjunction with the UIUC – School of Social Work – Research Center, consulted on the establishment and operation of Guardianship Title IV-E Demonstration waivers in both states. Focus was on cost neutrality calculations.





EDUCATION & CREDENTIALS

B.A. Accounting; *University of Missouri*
CPA Missouri; 1990

PROFESSIONAL MEMBERSHIPS

Federal Funds Information for States
American Public Human Services Association
Human Services Finance Officers





ROBERT A. LEFEBER Technical Advisor---Cost Allocation

BACKGROUND

Mr. Lefebber has a more than twenty-five year history of providing services to the public sector. He has served as a senior consultant and manager on a wide variety of strategic, organizational, operational, managerial, and financial consulting engagements in Illinois, Michigan, Minnesota, and Wisconsin. His experience includes a wide variety of reviews of well over 50 entities including highway/public works departments, sheriff's/police departments, human services departments, state agencies, and administrative support agencies.

In the area of financial consulting, Rob successfully managed the preparation of indirect cost allocation plans for 62 of Wisconsin's 72 counties. He has also performed numerous cost accounting, financial analyses, and user fee and cost-benefit studies for over a dozen local governments in Illinois, Minnesota, Missouri, and Wisconsin.

SKILLS & TECHNOLOGY

- Microsoft Excel
- Microsoft Word
- Microsoft PowerPoint
- Microsoft Outlook
- Microsoft Access
- Cost Allocation Plans
- Cost of Service/User Fee Studies
- Organization & Management Studies
- Financial Management & Cost Analysis

PROFESSIONAL EXPERIENCE

- | | |
|---|---------------|
| • Diversified Services Network Inc. (DSN)
<i>Sr. Consultant-Cost Plan Services</i> | 2019--Present |
| • Sequoia Consulting Group
<i>Wisconsin Practice Director</i> | 2017--2019 |
| • The Management Group
<i>Associate Director of Data Analytics and Reporting</i> | 2008—2017 |
| • Baker Tilly-Virchow Krause
<i>Manager</i> | 2003--2008 |
| • Maximus
<i>Manager</i> | 1993--2003 |

CONSULTING EXPERIENCE



Cost Allocation Plans:

Cost Allocation Plan Preparation

- Since 1993, served as Consultant, Senior Consultant, Manager, and Director.
- Responsibilities included the preparation of nearly 400 Cost Allocation Plans for various Wisconsin and Minnesota Counties.

Cost Allocation Plan Management

- Responsible for overseeing staff assigned to annually prepare as many as 60 County Cost Allocation Plans (currently nearly 40).
- City of Appleton, Wisconsin: User Fee Study
- Dane County, Wisconsin: Program Evaluation/Management Audit of Consolidated Food Service (CFS)
- Village of Germantown, Wisconsin: Cost Allocation Plan
- Kenosha County, Wisconsin: Health Department Cost & Revenue Analysis
- City of Kenosha, Wisconsin: Cost Analysis of Central City Services (multiple years)
- City of Neenah, Wisconsin: Cost Analysis and Revenue Study
- City of Oconomowoc, Wisconsin: User Fee Study Recreation Department
- City of Wausau, Wisconsin: Cost Analysis of Central City Services Provided to Enterprise Funds

Administrative Operations:

- Town of Bradley, Wisconsin: Organizational Assessment
- Village of Carol Stream, Illinois Community Development Department: Comprehensive Assessment of Operations
- Chippewa County, Wisconsin: Operational and Organizational Analysis of Administrative and Support Services
- Eau Claire County, Wisconsin: Management & Organizational Review of Purchasing Office
- City of Fitchburg, Wisconsin: Organizational Assessment
- City of Fort Atkinson, Wisconsin: Staffing and Organizational Assessment
- Town of Grand Chute, Wisconsin: Organizational Assessment
- Town of Greenville, Wisconsin: Organizational Overview and Assessment of Operations
- Jefferson County, Wisconsin: Administrative Services Operational Audit
- Madison Metropolitan School District and Madison School & Community Recreation Department (Wisconsin): Review of Cash Handling Procedures
- Marathon County, Wisconsin: High Level Functional Scan of Employee Duties and Responsibilities in the Finance Department
- Village of McFarland, Wisconsin: Management Analysis
- Town of Menasha, Wisconsin: Staffing, Organization, and Management Study of Operations
- City of Milwaukee, Wisconsin: Office of Comptroller Operations Review
- Pierce County, Wisconsin: Review of Administrative Services
- Pierce County, Wisconsin: Management & Organizational Review of Department of Land Management
- City of Portage, Wisconsin: Manager/Administrator Feasibility Study
- Rusk County, Wisconsin: Fiscal Diagnostic Review
- Sauk County, Wisconsin: Central Services Organizational Analysis
- Stoughton, Wisconsin: Review of Administrative and Financial Functions
- Trempealeau County, Wisconsin: Program Prioritization
- City of Whitewater, Wisconsin: Operational & Organizational Analysis of City Services

- Waukesha County, Wisconsin: Program Budget Development
- Jewish Vocational Service of Chicago: Operational Review of HR, Accounting and Finance and Information Systems Business Operations
- Wisconsin Office of the State Treasurer: Unclaimed Property Claims Processing Improvement Project

Law Enforcement/Public Safety Operations:

- Barron County, Wisconsin Sheriff's Department: Organization, Management, and Staffing Study
- City of Brookfield, Wisconsin Police Department: Organization, Management, and Staffing Study
- Door County Sheriff's Office: Operational Review
- Douglas County Sheriff's Office & City of Superior Police Department: Organization and Management Study for Consolidation of Services for a Joint Law Enforcement Center
- Dunn County, Wisconsin: Jail Staffing Analysis
- Eau Claire County, Wisconsin: Operational Review of the Sheriff's Office
- City of Elgin, Illinois: Analysis of the City's Costs for Providing Overtime Compensation for the Police and Fire Departments
- Outagamie County, Wisconsin: Organization, Management, and Staffing Study of Sheriff's Department
- Quad-Communities Police Department Consolidation (Villages of Combined Locks, Kimberly, Little Chute, and City of Kaukauna, Wisconsin): Feasibility Study
- Sauk County, Wisconsin: Operational Review of Sheriff's Department and Secure/Non-Secure Juvenile Detention
- Shawano County, Wisconsin: Operational and Staffing Review of the Sheriff's Department
- Sheboygan County, Wisconsin: Sheriff's Office Operations Review
- Superior Township, Michigan: Police Consolidation Study
- Washburn County, Wisconsin: Sheriff & Jail Department Operations Study
- City of Whitewater and University of Wisconsin – Whitewater: Analysis of the Feasibility of Consolidating Communications Centers
- Will County, Illinois: County-Wide Emergency Dispatch Consolidation

Highway/Public Works Operations:

- Adams County, Wisconsin Highway Department: Highway Department Operations Study
- City of Brookfield, Wisconsin Departments of Public Works, Planning and Zoning, Inspection Services, and Parks and Recreation: Review of Organization, Management, and Staffing
- City of Chicago Department of Water Management: Overtime Use in the Department of Water Management Bureau of Operations and Distribution
- City of Dearborn, Michigan: Public Works Department Operational Review
- Jefferson County, Wisconsin: Highway Department Operations Study
- City of Kenosha, Wisconsin Water Utility: Organizational Assessment
- City of Madison, Wisconsin: Department of Transportation Management Analysis
- City of Marinette, Wisconsin Water and Wastewater Utilities: Review of Operations
- Marinette County, Wisconsin Highway Department: Organization, Management, and Staffing Study
- City of Milwaukee, Wisconsin: DPW Fleet Operations Dispatch Office Analysis
- City of Milwaukee, Wisconsin: Department of Public Works Bureau of Forestry Review of Services
- City of Pewaukee, Wisconsin: Department of Public Works Functional Analysis of Operations

- City of Racine, Wisconsin: Performance Audit of the Parks, Recreation, & Cultural Services Department
- City of Racine, Wisconsin: Evaluation of the Operations of City Cemeteries
- City of Racine, Wisconsin: Department of Parks, Recreation, and Cultural Services Management & Organizational Review
- Sheboygan County, Wisconsin: Highway Department Operations Review
- City of Stoughton, Wisconsin: Organization and Management of the Street Department
- Washburn County, Wisconsin: Highway Department Operations Study
- City of Waukesha, Wisconsin: Review of Internal Analysis of Water Utility
- Winnebago County, Wisconsin: Highway Shared Services Study

Health & Human Services Operations:

- Adams County, Wisconsin Child Support Agency: Organization and Staffing Analysis
- Barron County, Wisconsin Health Department: Organization, Management, and Staffing Study
- School District of Beloit, Wisconsin: Office of School Health Review of Services
- City of Beloit & Rock County, Wisconsin: Merger Study of the City of Beloit Health Department into the Rock County Health Department
- Brown County, Wisconsin: Human Services Department Review
- Eau Claire County, Wisconsin: Review of Children's Court Services for Consideration of a Merger with the Department of Human Services
- Eau Claire County, Wisconsin: Organizational Overview of Veterans' Service Office
- Kenosha County, Wisconsin: Documentation of Work Effort for Department of Human Services
- La Crosse County, Wisconsin: Review of Care Management Organization's Financial Management Function
- Northcentral Health Care Center System (Marathon, Langlade, and Lincoln Counties, Wisconsin): Comprehensive Study of Services and Programs of the North Central Health Care System
- Northern Pines Community Programs (Barron, Burnett, Polk, Rusk, and Washburn Counties, Wisconsin): Review of Services
- Oneida County, Wisconsin: Oneida County Study of the Human Service Center
- Pierce County, Wisconsin: Organizational and Staffing Review of Public Health Department
- City of Racine, Wisconsin: Performance Audit of the Public Health Department
- Sauk County, Wisconsin: Human Services Department Organizational Analysis
- Sheboygan County, Wisconsin: Health & Human Services Department Study
- Waupaca County, Wisconsin: Market and Financial Analysis Lakeview Manor
- Will County, Wisconsin: Operational Audit of the Sunny Hill Nursing Home
- Wisconsin Department of Health and Family Services/Western Community Care: Family Care Business and Care Management Infrastructure Development
- Wisconsin Department of Health Services: Mental Health and Substance Abuse Infrastructure Study
- Wisconsin Department of Veterans Affairs: Cost/Revenue & Staffing Analysis of Downsizing Alternatives-Wisconsin Veterans Home-King
- Wisconsin Department of Veterans Affairs: Study of Douglas County Veterans Long-Term Health Care Needs and Facility Feasibility Study

Fiscal Impact/Financial Analyses:

- Appleton Area School District (Wisconsin): Independent Review of Calculations for Teacher Emeritus Plan



- Town of Bristol, Wisconsin: Fiscal Impact Analysis of the Proposed Bristol Meadows Development
- Milwaukee County, Wisconsin and Milwaukee County Regional Medical Center (MRMC): Analysis of Cost Sharing Arrangements
- Washington County, Minnesota: Facility Rental Rate Review
- Waukesha County, Wisconsin: Parks & Land Use Department Review of Charges to Enterprise Funds
- Wauwatosa School District (Wisconsin): Non-Resident Enrollment Study
- City of Verona, Wisconsin and Town of Verona Wisconsin: Independent Consolidation Fiscal Impact Analysis
- 1000 Water Street Condominium Association (Milwaukee, Wisconsin): Review of the Cost Allocation Methodology for Common Expenses
- Edison Public Schools, Newton Learning: Fiscal Impact Review
- Keefe Commercial, LLC: Fiscal Impact Analysis of Sugar Creek Preserve Development

EDUCATION & CREDENTIALS

Master of Public Administration degree, with an emphasis in urban management and development, *Northern Illinois University in 1992*

Bachelor of Arts degree, Cum Laude, with a major in political science and a minor in Business Administration, *DePaul University in 1990*

