



Solicitation Information

March 4, 2013

Continuous Recruitment #7461293

TITLE: The Health and Human Services Affordable Care Act (ACA) Assistance CR

Submission Deadline: Establishment of the Initial Continuous Recruitment list due April 9, 2013 @ 10:00 AM (EST)/Continuous recruitment through June 30, 2015 @ 10:00 AM (EST)

Questions concerning this solicitation must be received by the Division of Purchases at David.Francis@purchasing.ri.gov no later than **March 19, 2013 @ 12:00 AM Midnight (ET) to be considered in time for the initial establishment of the continuous recruitment list.** All other questions received after March 19, 2013 will be considered for subsequent recruitment periods one month prior to the due date. Questions should be submitted in a *Microsoft Word attachment*. Please reference the Continuous Recruitment # on all correspondence. Questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

SURETY REQUIRED: No
BOND REQUIRED: No

David J. Francis
Interdepartmental Project Manager

Vendors must register on-line at the State Purchasing Website at www.purchasing.ri.gov

Note to Vendors:

No offer will be considered that is not accompanied by a completed and signed Bidder Certification Cover Form.

Disk Based Bidding Information

File Format

All disk based bid files are ZIP files that you can open using the **WinZip 8.1** software. The ZIP file will contain one or more files based on the type of Bid/RFP.

Downloading the Disk Based Bid

Bids that have a file for download are marked with a "D" in the Info field of the bid search results. The "D" will be an active link to the WinZip file until the bid reaches its opening date. Clicking on the active "D" link will allow you to open or save the ZIP file associated with the bid. Opening the WinZip file will download a copy to your computer's temporary directory.

Opening the Disk Based Bid

Once downloaded, you can open the ZIP file with Winzip and view the Microsoft Office files contained within the WinZip file. Immediately save (extract) the individual files to an appropriate directory on your computer, such as "Desktop" or "My Documents".

Completing the Disk Based Bid

Once the Microsoft Office files are properly saved, open the individual files and enter the required information in the appropriate fields. Save each file again to capture the new information you entered.

Submitting the Disk Based Bid

Save the completed files to a CD or diskette. Label the CD or diskette with the Bid/RFP number and bidder's name (company name, not contract name). Submit as instructed in the Bid or RFP solicitation document.

THIS PAGE IS NOT A BIDDER CERTIFICATION FORM

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I. INTRODUCTION

The Rhode Island Department of Administration (DOA)/Division of Purchases is seeking to establish a list of qualified firms to provide assistance to the State's health and human service programs as it relates to the Affordable Care Act (ACA) and any current or future changes in laws affecting the ACA, in accordance with the terms of this solicitation and the State's General Conditions of Purchase, which is available at www.purchasing.ri.gov.

On March 23, 2010, President Obama signed into law the Patient Protection and Affordable Care Act. On March 30, 2010, the Health Care and Education Reconciliation Act of 2010 was signed into law. The two laws are collectively referred to as the ACA. The ACA creates an opportunity to reform the health insurance marketplace in order to provide all Americans with quality, affordable health insurance coverage. While the ACA provides states with significant latitude in how to implement these reforms, it also sets forth expectations regarding consumer-mediated enrollment processes; systems architecture and security; sharing technology assets among states; coordination among Medicaid, the Children's Health Insurance Program (CHIP), and the Exchange.

In order to maximize seamlessness and efficiency among State programs implementing elements of the ACA, Rhode Island will implement a single technology solution across programs that must be ready for open enrollment in new coverage programs for Medicaid, CHIP, and Exchange-based advanced premium tax credits by October 2013, and integrate other state programs including existing Medicaid programs, SNAP, TANF, Child Care, General Public Assistance, and State supplemental payments for SSI. This project is collectively known as the "Unified Health Infrastructure Project" (UHIP).

The State seeks to ensure that existing and new health and human service programs are current with state of the art program policy, procedures and operations as a result of the ACA law. The ACA is far-reaching and touches all aspects of Health and Human services. There is often a need to develop and implement new programs, initiatives, business methods, and analyses in response to changes in federal law and regulation, state legislation, and best practice advances in health policy and health care delivery systems.

It is the State's intent to utilize these enhanced program improvement resources as needed in response to the State's changing needs and requirements and as funding allows. This includes the use of temporary project funding through federal or foundation grants or other sources.

This Health and Human Services ACA & UHIP Continuous Recruitment is issued on behalf of:

- The Executive Office of Health and Human Services (EOHHS) which includes Rhode Island's Medicaid and Children's Health Insurance Program (CHIP) programs;
- The Department of Human Services (DHS) which administers other economic support programs including, but not limited to, the Supplemental Nutrition Assistance Program (SNAP), Rhode Island Works, the Temporary Assistance to Needy Families (TANF) program, Child Care, General Public Assistance, State Supplemental Payment, and Child Support;
- The Department of Health which is a diverse and interactive state agency with broad-ranging public health responsibilities.
- The Office of the Health Insurance Commissioner (OHIC) which regulates commercial health insurance; and

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- The Rhode Island Health Benefits Exchange, which will administer Advanced Premium Tax Credits (APTCs), Small Business Health Options Program (SHOP), and serve as a resource for all Rhode Islanders to compare health insurance coverage options.
- The Department of Administration, as a support role for Information Technology, Personnel, Human Resources, Legal, and Financial.
- The Office of Lt. Governor Elizabeth Roberts, as Chair of Rhode Island's Health Reform Commission.

The reference to "Health and Human Services" throughout this document shall mean the topical areas of health and human services, and shall not be construed to be specific to Rhode Island's Office of Health and Human Services.

This Continuous Recruitment will be used to create a list of qualified vendors for the services described within this solicitation. This Continuous Recruitment, which may be utilized by any of the aforementioned agencies or any other agency affected by the ACA, will expire on December 31, 2015 with the State's option of two one-year extensions. Service providers who are added to the qualified vendor list after the initial recruitment will serve until the scheduled end of this continuous recruitment contract term. Each recruitment will generate a new ranked list of positions and a qualified vendor list. (see below for more information) All service providers who desire to be included on this list must meet the qualifications described in Section V and Appendix A.

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II. INSTRUCTIONS AND NOTIFICATIONS TO VENDORS

Potential vendors are advised to review all sections of this Continuous Recruitment carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.

- Potential vendors are advised to review all sections of this RFP carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.
- Alternative approaches and/or methodologies to accomplish the desired or intended results of this procurement are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this RFP will be rejected as being non-responsive.
- All costs associated with developing or submitting a proposal in response to this RFP, or to provide oral or written clarification of its content shall be borne by the vendor. The State assumes no responsibility for these costs.
- Proposals are considered to be irrevocable for a period of not less than sixty (60) days following the opening date, and may not be withdrawn, except with the express written permission of the State Purchasing Agent.
- All pricing submitted will be considered to be firm and fixed unless otherwise indicated herein.
- Proposals misdirected to other state locations, or which are otherwise not present in the Division at the time of opening for any cause will be determined to be late and will not be considered. For the purposes of this requirement, the official time and date shall be that of the time clock in the reception area of the Division.
- It is intended that an award pursuant to this RFP will be made to a prime vendor, or prime vendors in the various categories, who will assume responsibility for all aspects of the work. Joint venture and cooperative proposals will not be considered. Subcontracts are permitted, provided that their use is clearly indicated in the vendor's proposal and the subcontractor(s) to be used is identified in the proposal.
- All proposals should include the vendor's FEIN or Social Security number as evidenced by a W9, downloadable from the Division's website at www.purchasing.ri.gov.
- The purchase of services under an award made pursuant to this RFP will be contingent on the availability of funds.
- Vendors are advised that all materials submitted to the State for consideration in response to this RFP will be considered to be Public Records as defined in Title 38, Chapter 2 of the General Laws of Rhode Island, without exception,

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and will be released for inspection immediately upon request once an award has been made.

- Interested parties are instructed to peruse the Division of Purchases website on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFP.
- Equal Employment Opportunity (G.L. 1956 § 28-5.1-1, et seq.) – § 28-5.1-1 Declaration of policy – (a) Equal opportunity and affirmative action toward its achievement is the policy of all units of Rhode Island state government, including all public and quasi-public agencies, commissions, boards and authorities, and in the classified, unclassified, and non-classified services of state employment. This policy applies to all areas where State dollars are spent, in employment, public services, grants and financial assistance, and in state licensing and regulation. For further information, contact the Rhode Island Equal Opportunity Office at (401) 222-3090.
- In accordance with Title 7, Chapter 1.2 of the General Laws of Rhode Island, no foreign corporation, a corporation without a Rhode Island business address, shall have the right to transact business in the State until it shall have procured a Certificate of Authority to do so from the Rhode Island Secretary of State (401-222-3040). This is a requirement only of the successful vendor(s).
- The vendor should be aware of the State's Minority Business Enterprise (MBE) requirements, which address the State's goal of ten percent (10%) participation by MBE's in all State procurements. For further information, contact the MBE Administrator at (401) 574-8253 or visit the website www.mbe.ri.gov or contact charles.newton@doa.ri.gov.

III. EXPLANATION OF SERVICES REQUESTED

From time to time, the State will require assistance for a particular project or with a particular function to support health or human services programs; therefore, through this Continuous Recruitment for Health and Human Services ACA Assistance, the State is seeking to pre-qualify a list of vendors who can supply technical assistance and subject matter expertise to support health and human service-related programs as circumstances require.

Throughout the Continuous Recruitment, the State may solicit bids from the list of pre-qualified vendors for either (a) fixed-price and not-to-exceed price projects or (b) skilled individuals compensated at an hourly rate to provide technical assistance to existing state resources in health policy, operations, analytics, communications and program development and management.

- (a) Projects will mean fixed-price or not-to-exceed price to be performed by vendor under the supervision of the State.

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(b) Technical assistance will mean the utilization of qualified individuals to support any functions that require skills or resources unavailable from existing State resources at the time of need. Contractors will work independently, but may in some cases operate under the close supervision of the State. Positions for skilled individuals in this group (b) are subject to the State public hearing process to the extent required by law.

Areas where services may be requested include, but are not limited to:

- Actuarial analysis
- Policy analysis
- Financial analysis
- Project management
- Business analysis
- Program development
- Program operations
- Data analysis
- Facilitation
- Communications and Outreach

A scope of work and pre-qualifications for bidders are described in detail in Appendix A. The State reserves the right to add additional areas of services to the above list, as required, for any recruitment cycle after this initial recruitment. The State will clearly articulate the areas of service for each recruitment.

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IV. CONTINUOUS RECRUITMENT PROCESS

Becoming a qualified vendor

Any vendor wishing to be considered as a qualified firm on the Continuous Recruitment for Health and Human Services should apply to the state for consideration as described in Section V.

Proposals submitted by April 9, 2013 @ 10:00 AM (EST) will be first considered by the State in April 2013. Once the initial list is established, a designated Continuous Recruitment evaluation management team will review applications semi-annually. For consideration in a given recruitment period, proposals must be received by the recruitment submission date posted on the Purchasing website. Vendors can submit materials at any time, but the State will only review submissions at the next recruitment cycle. Participation on the continuous recruitment RFP can only commence when the vendor has received a valid State purchase order. As indicated above, this continuous recruitment will allow for two (2) recruitments per year of this contract. The State will allow certain designated recruitments to be either a “Full” recruitment or a “New” recruitment. A “Full” recruitment is defined as all existing vendors already participating on the ACA continuous recruitment list as well as any new vendor wishing to join. In a full recruitment **new vendors** will submit both technical and cost proposals for evaluation and existing vendors, those already participating, will submit just a cost proposal.

A “New” recruitment is defined as a recruitment of only **new** vendors wishing to join the ACA continuous recruitment list. The rate cards submitted in either of the recruitments will be ranked lowest to highest by role with the full complement of participating vendors.

The State will open the Continuous Recruitment approximately every six (6) months. Vendors are encouraged to monitor the State Purchasing website for instructions on the recruitments. The state will make every attempt to notify existing participating vendors of the recruitments but it is the responsibility of the vendor to stay apprized of the details and instructions regarding all recruitments.

The State reserves the right to request a new recruitment as required to address specific State needs. Any ad hoc request by the Continuous Recruitment evaluation management team must be first requested and approved by the State Purchasing Agent or his/her designee before proceeding. All proposals should be in the format listed herein or otherwise indicated on the Purchasing Website.

Conducting work with the State

As described in Section III, once vendors become qualified by the state and are participating on this Continuous Recruitment, they may receive solicitations for both (a) fixed-price and not-to-exceed price projects and/or (b) skilled individuals compensated at an hourly rate to provide assistance to existing state resources in the categories described herein. There will be two (2) lists that this CR will solicit from - one for fixed-price and not-to-exceed price projects and the second a rank-ordered of positions for each category/role inclusive of the twenty-five (25) lowest cost rates. For fixed-price and not to exceed projects that list to solicit from will be the entire list of the qualified vendors that received at least 80 percent of the 70 allowable technical points on the technical score (56 points).

(a) Fixed-price and not-to-exceed price project proposals will be evaluated based on technical and cost proposals submitted in response to each project scope for which the State solicits

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responses. Vendors are encouraged to base cost proposals on their submitted hourly rates indicated on their rate card in section (b) below or preferably rates that are better than those stated in the submitted rate card.

All fixed-price projects and not-to-exceed price projects will be first approved and submitted by the requesting agency, and then reviewed by the Administrator of this Continuous Recruitment. The State will solicit fixed-price or not to exceed projects through the use of mini-bids from all vendors pre-qualified to participate on the list. The Administrator will ensure to solicit for fixed-price projects in accordance with the table below:

Fixed-price/ Not to Exceed Value	Solicited by	Qualified Bidders	Purchasing Process
Projects under \$100,000	Continuous Recruitment Administrator	Vendors pre- qualified through this continuous recruitment	Mini-bid with shorter proposal response time
Projects over \$100,000 but less than \$500,000	Division of Purchases unless delegated differently by the State Purchasing Agent/Chief Purchasing Agent	Vendors pre- qualified through this continuous recruitment	Mini-bid with shorter proposal response time
Projects over \$500,000	Division of Purchases	Any vendor	Full standard RFP with standard response time

Note: All engagements must have clearly defined deliverables, scope, and acceptance criteria. Payment terms will be based on work accepted – per deliverable, and if applicable, minus a retainage. For partially complete deliverables, payment will be based upon time worked as a percentage of total estimate. For a partially complete deliverable, the State will not pay more than 75% of the cost of the deliverable until such time the deliverable has been completed and accepted by the State.

For (b), skilled individuals compensated at an hourly rate to provide technical assistance to existing state resources in the areas of services listed in Section III, an hourly rate card will be established by category/role and ranked from the lowest rate to the highest rate by position.

Evaluation Process for Rate Card

To be eligible for the rate card, vendor must achieve **a combined score of 80 points for both the technical and cost evaluation by category/role**(e.g. senior actuary) The State will first evaluate each vendor proposal and assign a technical score. The State will then distribute the 30 cost points per category/role using the following algorithm- (lowest hourly rate for the role from all vendor submissions divided by the vendor’s hourly rate for the role) This yields either a fraction or one(1) and it is used to multiply the 30 potential cost points). For example, if vendor

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“X” has the lowest hourly rate (\$100) for a senior actuary position, they will get all 30 points (e.g. \$100/hr - lowest hourly rate- divided by vendor’s rate \$100/hr times 30). The State will then add the vendor’s technical score (e.g. 65pts) to the 30 points. If the combined score is 80 points or above the vendor will participate on the rate card for that specific role. In this particular example the vendor would have achieved a total score of 95 points for that specific category/role and would participate. To continue this example, another vendor, “B” with the same technical score(65pts) but costing three(3) times as much per hour(\$300), would receive a total of 75 points - 65pts technical and 10pts for cost(\$100/hr divided by \$300/hr times 30 equals 10 points). Vendor “B” did not achieve the required combined score of 80 points and will not participate on the rate card. All vendors who score 80 points or higher for a category/role will be ranked from low to high by role/category to create a rate card by category/role. When hiring for staff compensated at an hourly rate, the State will request resumes from the 10 lowest cost positions ranked on the category/role list for the position. If an individual is not found from the initial 10 positions, the state (Continuous Recruitment Administrator) will solicit resumes from the next 10 positions and so on. If there are less than ten (10) vendor positions in a category, all vendors or those remaining will receive the request for resumes. When hiring, the state reserves the right to negotiate the submitted hourly rates. However, vendor is encouraged to submit their best rates. The rate negotiated will be consistent with the individual’s experience, qualifications and term requested. The State reserves the right to engage an individual with specific required qualifications anywhere on the ranked list. However, the requesting agency must document to the CR administrator and the CR management team the reason for not following the standard procedure.

The State of Rhode Island reserves the right to proceed differently than stated above if it is in the best interest of the State. Exceptions to the above process may be granted but will require a written request for approval by the Continuous Recruitment evaluation management team to the State Purchasing Agent and or State Chief Purchasing Agent.

Vendors are encouraged to monitor the Purchasing Website for the opportunity and instructions to submit proposals. Information regarding the submission of proposals and when to submit will be found on the Purchasing Website.

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V. SUBMISSION OF RESPONSES FOR CONSIDERATION AS A QUALIFIED SERVICE PROVIDER

Responses to this solicitation must include the following, and be neatly organized in a soft covered binder with each of the following sections – items 1 through 8 below – separated by tabbed divider pages that are clearly labeled. Vendors may choose to participate in multiple categories delineated in Appendix A. If so, vendors shall submit items #1 and #2 once, and submit items three through seven for each category for which the vendor is requesting participation.

Technical Proposal:

1. A completed and signed four-page RIVIP Bidder Certification Cover Form, available at www.purchasing.ri.gov,
2. A statement indicating which area(s) the vendor is requesting to participate in (e.g. actuarial analysis, project management, etc.)

For each category:

3. A separator page with the category name listed.
4. A cover letter describing health and human services background, relevant category experience, relevant ACA or integrated eligibility experience, and organizational capacity. Vendor should use this cover letter to articulate to the State of Rhode Island why their experience, qualifications, and staff meet the requirements of the category for which the vendor is requesting participation. (The cover letter for each category should not exceed a maximum of 6 pages)
5. A current resume for the individual (sole proprietorships) for the category to which the vendor is responding, or resumes of three current staff per category for larger corporations.
6. Describe any health-related accreditations, achievements, or certifications vendor possesses.
7. Three references with contact information per category.

Cost Proposal:

8. The vendor's best fully-loaded flat-rate, hourly fee structure (per category/role) for the services described within Appendix A (please use the provided Excel spreadsheet available at the Purchasing website- www.purchasing.ri.gov – Appendix B to submit your rates on a CD. Please submit 2 CDs and be sure to verify each CD for content and that each is readable)

Selected vendors will be required to submit a completed and signed W-9 (taxpayer identification number and certification). Form is downloadable at www.purchasing.ri.gov.

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1) An original and 4 copies for the technical Proposal in one envelope or box(es), and

2) For the cost Proposal, 2 cost CDs clearly labeled with vendor name in a separate envelope

Both items should be mailed or hand-delivered by the indicated submission date and time in a sealed envelope/box marked “CR# 7461293- The Health and Human Services Affordable Care Act (ACA) Assistance CR” to:

STATE OF RHODE ISLAND
DIVISION OF PURCHASES
ONE CAPITOL HILL, 2ND FLOOR
PROVIDENCE, RI 02908-5855

Additionally, an electronic copy of all materials should be submitted via email to david.francis@purchasing.ri.gov with the subject line referencing “CR# 7461293- The Health and Human Services Affordable Care Act (ACA) Assistance CR”

Vendors submitting proposals that do not follow the above instructions may be disqualified.

VI. EVALUATION CRITERIA TO BE DESIGNATED A QUALIFIED SERVICE PROVIDER

The State will convene a Selection Committee that will score each response according to the following categories and associated points.

Technical Criteria & Points:

Relevant Experience in Health Care *30 points*

Respondents will be evaluated on their demonstrated experience related to health and human services, including but not limited to: public and private health care delivery systems, public and private payment systems, streamlined eligibility and enrollment for public assistance programs, experience with federal and state health and human services law, and relevant experience with health care strategic planning, quality metrics, evaluation and monitoring, policy development and implementation, and program operations.

Relevant Technical Expertise *30 points*

Respondents will be evaluated on their demonstrated experience and expertise in the respondent’s relevant category. For example, respondents to the category of “Actuary” will be evaluated based on their relevant actuarial experience and expertise as required in Appendix A. This will be ascertained from item 2 above the cover letter.

Relevant Organizational Capacity *10 points*

Respondents will be evaluated on their ability to demonstrate completion of past projects on schedule and within budget.

Total Technical: *70 points*

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Cost Points:

Cost Points for Rate Card

30 points

Total Points: *100 points*

Respondents scoring a minimum of 80% of the 70 technical points will be selected as a “qualified service provider” under this master price agreement resulting from the continuous recruitment. Designation as a qualified service provider is not a guarantee of work from the State.

Notwithstanding the above, the State reserves the right to accept or reject any, or all, options, bids, proposals, to waive any technicality, to award on the basis of cost alone, and to act in its best interest.

Proposals found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further.

The State may, at its sole option, elect to require interviews with offerors clearly in consideration for award.

Those designated as a “qualified service provider” will receive solicitations for specific projects or for technical assistance provided by individuals at hourly rate as the State identifies the need.

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VII. GOVERNING TERMS AND CONDITIONS

The State's General Conditions of Purchase contain the specific contract terms, stipulations and affirmations to be utilized for the contract awarded to the RFP. The State's General Conditions of Purchases/General Terms and Conditions can be found at the following website:

<http://www.purchasing.ri.gov/RIVIP/publicdocuments/RULES2011/ATTA.pdf>

INSURANCE

Only vendors receiving State Continuous recruitment contracts will be required to have the following Insurance when selected for a fixed-price, not-to-exceed, or staffing contract. Vendors shall procure at their expense and maintain all insurance required in form and terms acceptable to State for the duration of the contract or as otherwise specified. Before issuance of a Purchase Order Release, vendors are required to certificates of insurances and any required endorsements acceptable to the State. Vendor shall provide State with replacement Certificate(s) and endorsements upon expiration, renewal, expiration or cancellation of the policies during the term of the contract, unless a longer period is specified. All certificates and endorsements shall reference this continuous recruitment RFP.

Commercial General Liability Insurance: Commercial General Liability Insurance covering bodily injury broad form property damage, personal and advertising injury, independent contractors, products completed operations, and contractual coverage. Coverage shall be written on an occurrence basis and shall extend to an agent, independent contractor, temporary worker and a leased worker. A combined single limit of \$1,000,000 per occurrence and aggregate is required.

Auto Liability Insurance: Auto Liability Insurance covering all owned, non-owned or hired vehicles. A combined single limit per occurrence of \$1,000,000 will be obtained.

Workers Compensation: Workers Compensation coverage in compliance with the workers' compensation laws of the State. Coverage shall include Employers Liability Insurance with minimum limits of \$500,000 each accident, \$500,000 disease or policy limit, \$500,000 each employee.

Alternative Employer Endorsement shall be required for both the workers compensation and employers liability policy.

Errors and Omissions Liability Insurance: Coverage to include Errors or Omissions, Product Failure, Security Failure, Professional Liability and Personal Injury. Contractor will obtain Errors and Omissions Liability Insurance with minimum limits of \$1,000,000 per occurrence and aggregate. Insured will include any individual who is an agent, independent contractor, leased worker or temporary worker while acting within the scope of his or her contract with the named insured on projects under this Continuous Recruitment.

The State will be defended, indemnified and held harmless to the full extent of any coverage actually secured by the Contractor in excess of the minimum requirements set forth above. The duty to indemnify the State under this agreement shall not be limited by the insurance required in this section or in any way limit the Contractor's liability.

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The Commercial General Liability Insurance, Auto Liability Insurance and the Errors and Omissions Liability Insurance shall include the State, agencies, officers and employees as Additional Insured but only with respect to the Contractor's activities under the contract.

The insurance required through a policy or endorsement shall include:

A waiver of subrogation waving any right to recovery the insurance company may have against the State, its agencies, officers and employees.

A provision that Contractor's insurance coverage shall be primary as respects any insurance, self- insurance or self-insured retention maintained by the State, its agencies, officers and employees. Any insurance, self- insurance or self- insured retention maintained by the State, its agencies, officers and employees shall be in excess of the Contractor's insurance and shall not contribute.

There shall be no cancellation, material change, potential exhaustion of aggregate limits or non-renewal without 30 days written notice from the Contractor or its insurer(s) to the Department of Administration, Division of Information Technology and to the Purchasing Agent. Any failure to comply with the reporting provisions of this clause shall be grounds for immediate termination of this contract.

Insurance coverage required under the contract shall be obtained from insurance companies acceptable to the Purchasing Agent.

The Contractor shall pay all deductibles, self-insured retentions and/or self insurance included hereunder.

The Contractor shall disclose to the State the amount of any deductible, self-insured retention and/or self-insurance. The State reserves the right to reject any such insurance as not complying based on the amount of the deductible, self-insured retention and/or self-insurance.

The Purchasing Agent reserves the right to consider and accept alternative forms and plans of insurance or to require additional or more extensive coverage for any individual requirement.

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Appendix A: Categories for Service Providers

Category	Scope of Work and Pre-bid Qualifications
Actuarial analysis	<p><i>Scope of Work:</i> To perform actuarial analysis to support commercial and public health insurance programs, including but not limited to rate setting, actuarial certification, product categorization by actuarial tier, and analysis to support new policy development and implementation. Position titles include Actuary and Senior Actuary.</p> <p><i>Pre-bid qualifications:</i> FSA certification required, MAAA preferred. Experience in health care financing. Presents strong verbal and written communication skills. Must present demonstrated ability to synthesize complex information into clear options, messages, and/or actionable recommendations. Ability to work collaboratively as part of a team to achieve client objectives; able to initiate and sustain successful working relationships with associates, community stakeholders and public and private agencies. For Actuary, must have at least two years of experience. For Senior Actuary, must have at least five years of experience.</p>
Policy Analysis	<p><i>Scope of Work:</i> To perform policy and legal analyses to support commercial and public health insurance programs, including but not limited to:</p> <ul style="list-style-type: none"> • Provides professional and analytical support focusing on the analysis, program development and evaluation of applicable health services and health coverage programs. • Provides professional/analytical support to applicable health care service programs • Monitors current industry developments that may impact health care service offerings, internal policy direction, and health insurance products, including legislative/legal developments at the local, state and federal level. • Provides analysis of state and federal statutes, regulations, guidance, etc. pertaining to health and human service programs <p>Position titles include Policy Analyst and Senior Policy Analyst.</p> <p><i>Pre-bid qualifications:</i> Master's degree in health or policy-related field. Or combines a Bachelor's degree with significant work experience in health care and policy analysis. Experience in health care policy and regulation. Presents strong verbal and written communication skills. Ability to work collaboratively as part of a team to achieve client objectives; able to initiate and sustain successful working relationships with associates, community stakeholders and public and private agencies. For Policy Analyst, must have at least two years of experience. For Senior Policy Analyst, must have at least five years of experience.</p>
Financial Analysis	<p><i>Scope of Work:</i> To apply a broad knowledge of financial principles and skills, acquired in the health care, medical or insurance industry, in analyzing financial and associated data, including but not limited to:</p> <ul style="list-style-type: none"> • Provide support to the analyses of pricing and rate setting and in assessing the budgetary implications of alternative program scenarios and approaches, including the coordination of actuarial data requirements and submitting data to actuaries • Assist in the formulation and review of budgets for current year and future years, including reports and financial

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	<p>schedules</p> <ul style="list-style-type: none"> • Assist in the study of alternative provider reimbursement strategies • Develop appropriately documented financial databases and auditing trails. • Provide support to program integrity efforts, including state and federal data inquiries • Participate in impact studies assessing probable outcomes in the design and implementation of new/revised policies, procedures and programs on the financing of services. <p>Position titles include Financial Analyst and Senior Financial Analyst.</p> <p><i>Pre-bid qualifications:</i> Master’s degree in health or finance related field. Or combines a Bachelor’s degree with significant work experience in health care, financial analysis, and reporting. Two years experience in government or not-for-profit accounting. 3-5 years of experience in the health care field and strong knowledge of medical claims and managed care reimbursement systems. Demonstrates proficiency with Excel. Independent user experience with relational databases a strong plus. Presents strong verbal and written communication skills. Ability to work collaboratively as part of a team to achieve client objectives; able to initiate and sustain successful working relationships with associates, community stakeholders and public and private agencies. For Financial Analyst, must have at least three years of experience. For Senior Financial Analyst, must have at least five years of experience.</p>
Business Analysis	<p><i>Scope of Work:</i> Defines the responsibilities, operations, attributes, process flows and relationships necessary to realize the business objectives of the project. Experience in gathering and documenting business requirements in technical application development settings. Must be able to describe both functional and process work flow requirements. Produces both functional and process requirements and documentation necessary to design and build an information system. Position titles available include Business Analyst and Senior Business Analyst. <i>Pre-bid qualifications:</i> For Business Analyst, a minimum of two years of experience. Exposure to the development of use-case and process flow models is preferred. For Senior Business Analyst, a minimum of five years of experience. Specific experience in the development of use-case and process flow models is preferred. Experience and certification in application delivery methodology is preferred but not necessary.</p>
Program Development	<p><i>Scope of Work:</i> To assist in health care program development, including but not limited to:</p> <ul style="list-style-type: none"> • Planning, designing, implementing and evaluating health care delivery systems. • Identifying and assessing opportunities and risks for state programs • Planning and implementing strategies to address system needs and gaps; • Defining program outcomes and indicators to be monitored; • Designing and assessing financing strategies, pricing and payment mechanisms to support initiatives;

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	<ul style="list-style-type: none"> • Coordinating program functional design with information and claims payment system structures; • Engaging with various stakeholders regarding program development. <p>Position titles include Program Developer and Senior Program Developer.</p> <p><i>Pre-bid qualifications:</i> Master’s degree in relevant field. Or combines a Bachelor’s degree with significant work experience in health care and program development. Possesses and applies a broad knowledge of health care programs, policy, process and administration. Able to apply a strong knowledge of concepts to tasks and activities that are complex in nature and perform a full range of analytical and/or professional activities. Able to manage and complete multiple tasks simultaneously with considerable self direction. Ability to work collaboratively as part of a team to achieve client objectives; able to initiate and sustain successful working relationships with associates, community stakeholders and public and private agencies. For Program Developer, must have at least three years of experience. For Senior Program Developer, must have at least seven years of experience.</p>
Program Operations	<p><i>Scope of Work:</i> To promote superior performance in core operational functional areas within Exchange, Medicaid and other state agencies. These activities support the full range of health care programs operated through State agencies. Areas of focus include:</p> <ul style="list-style-type: none"> • integration of new initiatives into operations; • program modifications, expansions and re-designs; • business process improvements, management and operations reporting; • monitoring of and liaison with health care plans and key certified providers, compliance review, and • plan/provider problem solving and technical assistance. <p>Position titles include Program Operator and Senior Program Operator.</p> <p><i>Pre-bid qualifications:</i> Master’s degree in relevant field. Or combines a Bachelor’s degree with significant work experience in health care and program operations. Possesses and applies a broad knowledge of health care programs, policy, process and administration. Able to apply a strong knowledge of concepts to tasks and activities that are complex in nature and perform a full range of analytical and/or professional activities. Able to manage and complete multiple tasks simultaneously with considerable self direction. Ability to work collaboratively as part of a team to achieve client objectives; able to initiate and sustain successful working relationships with associates, community stakeholders and public and private agencies. For Program Operator, must have at least three years of experience. For Senior Program Operator, must have at least seven years of experience.</p>
Data Analysis	<p><i>Scope of Work:</i></p> <ul style="list-style-type: none"> • Develop and present analyses in support of the State’s implementation of the Affordable Care Act.

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	<ul style="list-style-type: none"> • Provide policy and planning support in in connection with public and private health care delivery systems and payment mechanisms • Develop and organize available datasets including claims data sets and the state’s hospital discharge database • Analyze program data, including utilization, cost and indicators of quality. • Engage in research and data acquisition in evaluating the quality of health care provided to the enrolled population. • Participate in focused studies on health care delivery system purchasing and delivery. • Develop and execute impact studies assessing probable outcomes in the design and implementation of new/revised policies, procedures and programs. • Monitor and convey academic and industry developments that may impact the depth and scope of studies undertaken. <p>Position titles include Data Analyst and Senior Data Analyst.</p> <p><i>Pre-bid qualifications:</i> Master’s degree in relevant field. Or combines a Bachelor’s degree with significant work experience in health care and data analysis. Must be sensitive to the uses and limitations of data. Must demonstrate characteristics of curiosity, creativity, intellectual dexterity and flexibility. Ability to work collaboratively as part of a team to achieve client objectives; able to initiate and sustain successful working relationships with associates, community stakeholders and public and private agencies. For Data Analyst, must have at least two years of experience. For Senior Data Analyst, must have at least five years of experience.</p>
Project Management	<p><i>Scope Of Work:</i> Individual who plans, executes and controls a project. Develops project plans which defines scope, activities, and schedule as evidenced by a work break down structure. Coordinates project activities and resources. Reports status and issues to project steering/management committees. Works on behalf of the State with vendor project managers to manage and coordinate large projects.</p> <p><i>Pre-bid qualifications:</i> PMP certification or equivalent experience preferred. Experience with projects of similar size and scope, methodology and technologies may be required. Experience with large, multi-year projects. Strong written and verbal communication skills; Ability to work collaboratively as part of a team; Experience in health care-related field preferred;</p> <p>For Project manager, must have at least 4 years of experience. For Senior Project Manager, must have at least 8 years of experience</p>
Facilitation	<p><i>Scope of Work:</i> Provide services as a facilitator or moderator to agency projects and initiatives. May include facilitating stakeholder meetings, both internal and external to the State. Facilitation may include synthesizing and documenting input, issues, outcomes, and conclusions resulting from any series of meetings or activities. Position titles include Facilitator and Senior Facilitator.</p>

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	<p><i>Pre-bid qualifications:</i> Master’s degree in related field. Or combines a Bachelor’s degree with significant work experience in facilitation and moderation. Experience in health care-related facilitation projects a plus. Presents strong verbal and written communication skills. Ability to work collaboratively as part of a team to achieve client objectives; able to initiate and sustain successful working relationships with associates, community stakeholders and public and private agencies. For Facilitator, must have at least three years of experience. For Senior Facilitator, must have at least seven years of experience.</p>
<p>Communications and Outreach</p>	<p><i>Scope of Work:</i> [Plan, direct, coordinate and evaluate media relations, craft communication strategy, identify issues, events and public relations needs. Organize media site visits and assist the press in developing stories. Compose and produce press releases, fact sheets and brochures and other public relations documents. Prepare briefing books and other materials for the media, general public and General Assembly. Develop communication strategies and materials for stakeholders, focus groups,, task forces and advisory groups. Providing training and technical assistance on all aspects of communication, marketing and public relations.</p> <p>Position titles include Communications and Outreach Analyst and Senior Communications and Outreach Analyst.</p> <p><i>Pre-bid qualifications:</i> Master’s degree in related field. Or combines a Bachelor’s degree with significant work experience in facilitation and moderation. Experience in health care-related communications and/or outreach projects a plus. Presents strong verbal and written communication skills. Ability to work collaboratively as part of a team to achieve client objectives; able to initiate and sustain successful working relationships with associates, community stakeholders and public and private agencies. For Communications and Outreach Analyst, must have at least three years of experience. For Senior Communications and Outreach Analyst, must have at least seven years of experience.</p>