

Population Health Management (PHM) Services Invitation for Proposal (IFP) 21-10375

Voluntary Pre-Proposal Conference

May 16, 2022
10:00 AM – 11:30 AM



PHM Services IFP 21-10375 Voluntary Pre-Proposal Conference



Welcome



PHM Service IFP 21-10375

Presenters

Web Conference Host

» **Kelley Dorning**, Assistant Chief, Contracts Division

Web Conference Presenters

» **Aita Romain**, Health Program Manager,
Population Health Management Service Section,
Quality & Population Health Management Division



PHM Service IFP 21-10375

Conference Reminders

- » Conference slide deck will be available on the Contracts Division (CD) website on or about May 20, 2022
- » Web conference will be in listen only mode
- » Closed captioning is available, click the small text bubble with CC in the lower left corner of the screen
- » All attendees will be muted upon entry and throughout the duration of the web conference
- » Verbal DHCS statements made during this conference are non-binding
- » All questions must be submitted to 'All Panelists' using the chat-box
- » Responses to questions submitted during the conference may be provided during the Q&A session at the end of the presentation and / or in a written format at a later date



Agenda

Voluntary Pre-Proposal Web Conference Agenda Item		Time (minutes)
	IFP Summary	2 min.
	Procurement Scope and Objectives	10 min.
	Overview of Procurement Process	6 min.
	IFP and Contract Update Highlights	12 min.
	Submitting Proposer Questions for IFP 21-10375	6 min.
	Review Key Dates	6 min.
	Q&A Session	43 min.
	Concluding Remarks	2 min.



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Summary

- » This voluntary pre-proposal (web) conference is for IFP 21-10375
- » This procurement solicits proposals for the development, operation, and eventual turnover to DHCS, with all ownership rights as described on the IFP, of the administration of the Population Health Management (PHM) Service
- » In addition, this IFP will request Proposers to submit options to DHCS for implementation of enhanced population health management services (identified as Optional Contractual Services)



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Procurement Scope and Objectives



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Procurement Goals



Mission

To offer a whole-system, person-centered service delivery to Medi-Cal members that support the quadruple aim: enhanced patient experience, Improved population health, reduced cost, and improved work life of healthcare providers



Vision

To provide a data-driven service that supports whole-person care through integrating Medi-Cal member medical, behavioral, and social service Information from disparate sources, performing population health functions, and allowing for multi-party data access and sharing

Goals

- Support DHCS's vision for population health management and key population health functions
- Integrate data from disparate sources
- Allow multi-party data access and exchange
- Aggregate, link, and provide access to a variety of data types



PHM Service will evolve over time and be dynamic to meet the goal of Medi-Cal members achieving longer, healthier, happier lives, in addition to reducing disparities



PHM Service IFP 21-10375

Description of Services



Intake, Screening & Assessment

- Intake & Registration
- Screening & Assessment
- Consent Management



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Description of Services



Care Coordination & Planning

- Individual Care Plan & Coordination



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Description of Services



Population Health Management

- Disease & Condition Surveillance
- Risk Stratification & Segmentation
- PHM Program Support



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Description of Services



Beneficiary & Stakeholder Engagement

- Information Access
- Education & Communication
- Beneficiary & Stakeholder Relations



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Description of Services



Enterprise Relationship Management

- Information Exchange
- Stakeholder Interactions
- Beneficiary Targeting & Marketing



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Description of Services



Advanced Data & Analytics

- Data Collection, Conversion & Enrichment
- Data Governance & Compliance
- Analytics & Business Intelligence



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Description of Services



Quality, Performance Management & Reporting

- Service Design & Governance
- PHM Service Monitoring & Reporting
- Reporting & Measurements
- Quality Management & Performance Management



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Description of Services



Regulation & Compliance

- Regulatory & Compliance
- Enforcement
- Data Retention & Retrieval



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Description of Services



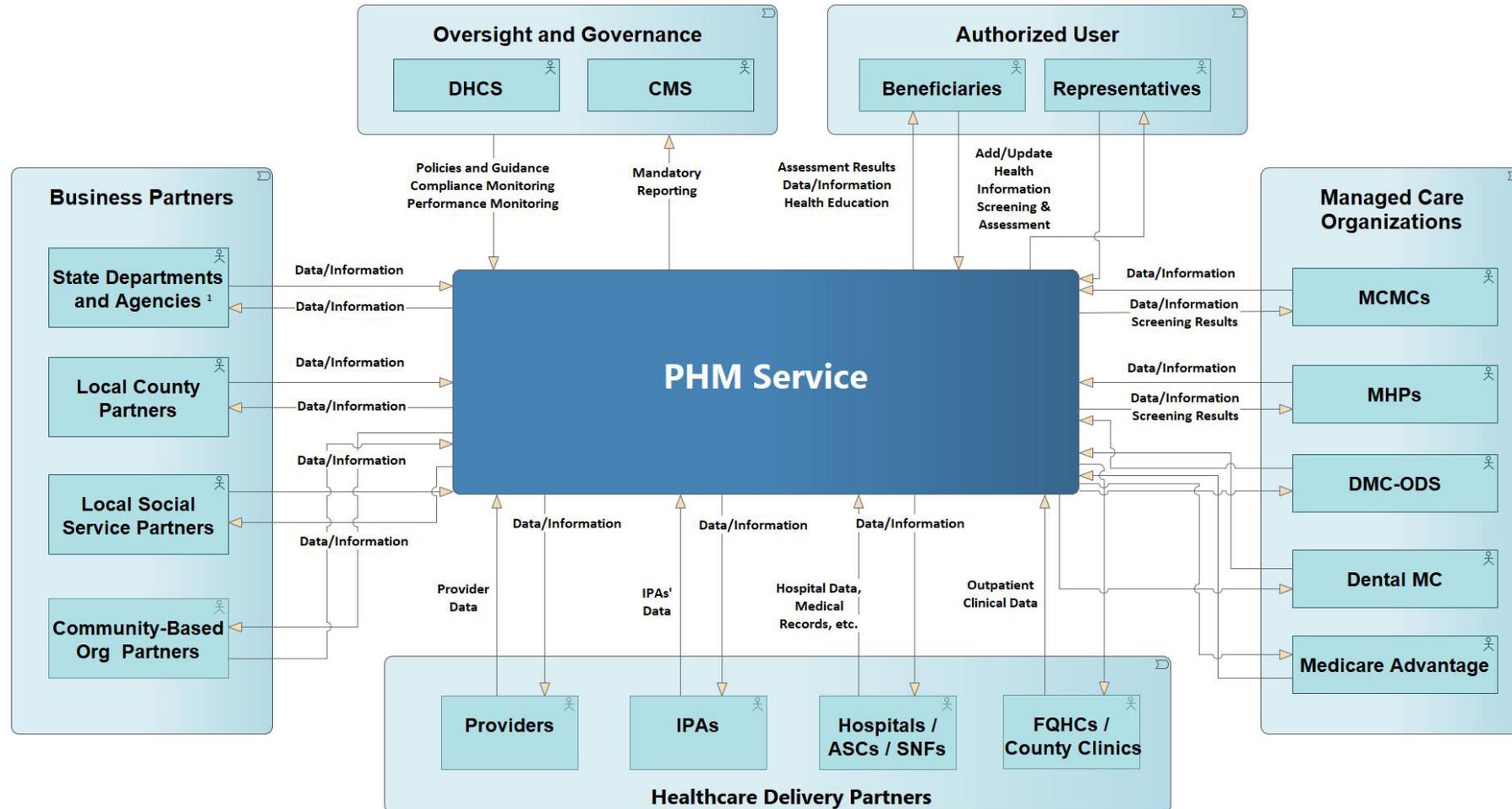
Business Support Services

- Security & Confidentiality
- Disaster Prevention, Disaster Recovery, & Business Continuity
- Consumer Contact Center
- Enterprise Technology
- Problem Correction Process
- Data Architecture
- Application Architecture
- Integration Architecture



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Context Model



¹ California Department of Public Health (CDPH), California Department of Social Services (CDSS), Child Health and Disability Prevention (CHDP), etc.



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Overview of Procurement Process



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Documentation Overview

Procurement Component	Purpose
1. Cover Letter	Provides information and instructions for Interested Parties
2. IFP Main	Provides information regarding the IFP process and instructions on proposal development
3. Attachments	Contains the optional and required attachments described in the IFP Main
4. Appendices	Contains information regarding the Data Library and file submissions
5. Exhibits	Includes sample Scope of Work (SOW), terms, conditions, and conditions for the contracts resulting from the IFP process. Also includes the operational requirements for the PHM Service



PHM Service IFP 21-10375

Documentation Overview

» Invitation for Proposal Main

» Attachments

- » Att. 1 Proposal Cover Page
- » Att. 2a Narrative Proposal Required Attachments/Certification Checklist
- » Att. 2b Cost Proposal Required Attachments/Certification Checklist
- » Att. 3 Client References
- » Att. 4 IFP Clause Certification
- » Att. 5 CCC 04/2017-Certification
- » Att. 6 Payee Data Record
- » Att. 6a Payee Data Record Supplement
- » Att. 7 Follow-on Consultant Contract Disclosure
- » Att. 8 Darfur Contracting Act Certification
- » Att. 9 Iran Contracting Act Certification
- » Att. 10 Voluntary Letter of Intent
- » Att. 11 Request for Inclusion on Distribution List
- » Att. 12 Non-Small Business Subcontractor Preference Instructions
- » Att. 13 Target Area Contract Preference Act (TACPA) Certification
- » Att. 13.1 TACPA Bidder's Summary
- » Att. 14 Conflict of Interest Compliance Certificate
- » Att. 15 Civil Rights Certification
- » Att. 16 Evaluation Questions
- » Att. 17 Proposer Response Guide
- » Att. 18 Bidder Declaration Form
- » Att. 19a Cost Proposal
- » Att. 19b Cost Proposal Instructions
- » Att. 20 Key Staff Requirements



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Documentation Overview

» Exhibits

- » Exhibit A, Scope of Work
- » Exhibit A, Attachment I, Initiation
- » Exhibit A, Attachment II, Operations
- » Exhibit A, Attachment III, Turnover
- » Exhibit A, Attachment IV, Optional Contractual Services
- » Exhibit B, Budget Detail and Payment Provisions
- » Exhibit B, Attachment I, Special Payment Provisions
- » Exhibit C, General Terms and Conditions (GTC 04/2017)
- » Exhibit D(F), Special Terms and Conditions
- » Exhibit D(F), Attachment 1, Certification Regarding Lobbying
- » Exhibit D(F), Attachment 2, Certification Regarding Lobbying
- » Exhibit E, Additional Provisions
- » Exhibit E, Attachment I, Escrow Bid Documents Certification



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Documentation Overview

» Exhibits (continued)

- » Exhibit F, Contractor's Release
- » Exhibit G, Travel Reimbursement Information
- » Exhibit H, HIPAA Business Associate Addendum
- » Exhibit I, Non-Discrimination Language
- » Exhibit J, Staffing Requirements
- » Exhibit K, DVBE Report
- » Exhibit L, DHCS Information System Security Requirements
- » Exhibit L, Attachment I - System Security Plan Template and Instructions
- » Exhibit L, Attachment II - Technology Recovery Plan Template and Instructions
- » Exhibit L, Attachment III - Data Management Plan Template
- » Exhibit M, Glossary of Terms



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Documentation Overview

» **Appendices**

- » Appendix 1.0, Data Library Instructions
- » Appendix 1.1, General Data Library Index
- » Appendix 1.2, Request for Data Library Materials
- » Appendix 1.3, Data Library Security and Confidentiality Agreement
- » Appendix 1.4, Data Library Media Destruction Agreement
- » Appendix 2, Maps - Location of DHCS

» **Additional Resources (See Administrative Bulletin)**

- » Appendix 3, PHM Service Demonstration Scenarios
- » Appendix 4, Draft Population Health Management Strategy and Roadmap



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IFP and Contract Update Highlights



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IFP Highlights

» Qualification Requirements

- » Proposer should have at least ten (10) consecutive years of experience in providing similar scope(s) of service
- » Applicants are expected to provide a detailed summary of current experience and projects with a suite of related sub-services and functionalities
- » Please see section **IFP Main, Section N. Qualification Requirements** for the complete set of qualification requirements

» Evaluation Questions

- » 44 scored evaluation questions
- » Represents requirements to the Master Work Plan, Initiation Phase, Operations Phase, and Turnover Phase

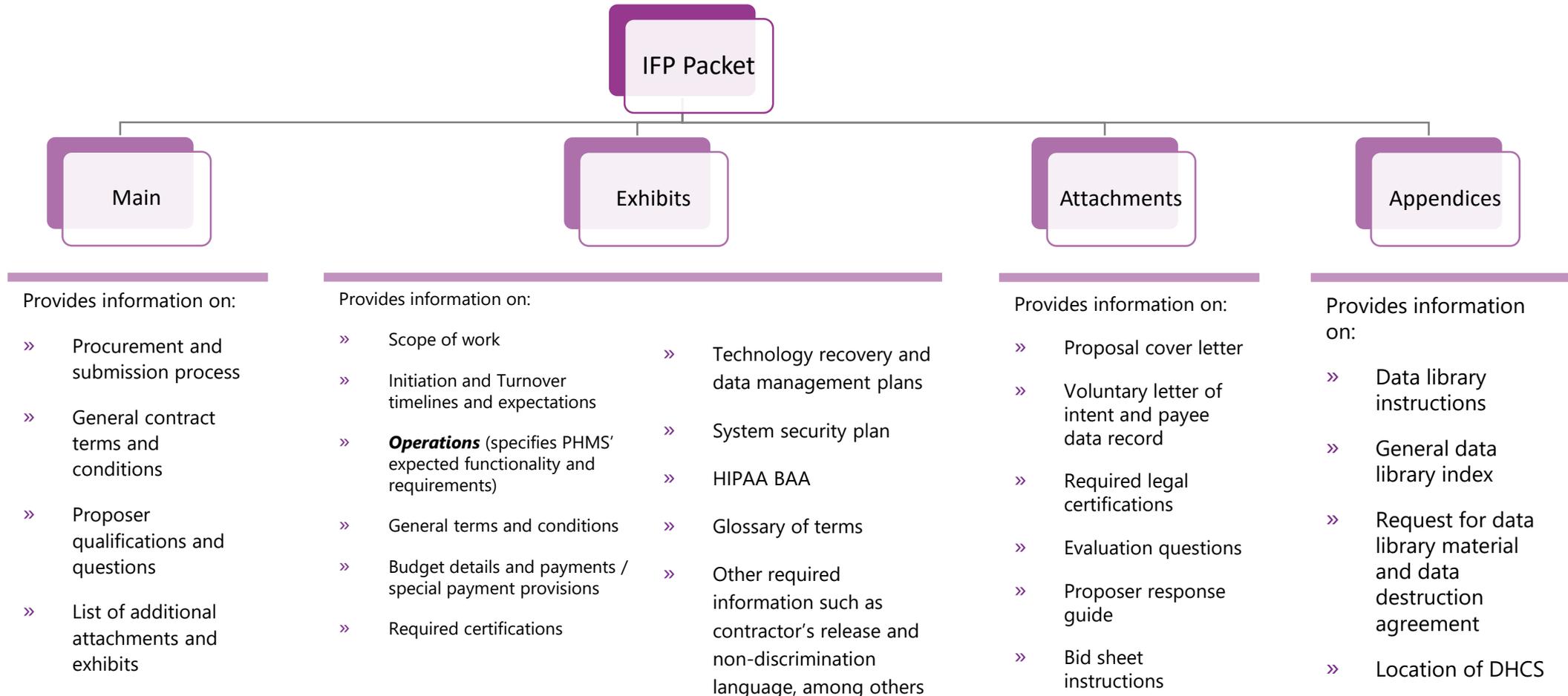
» Contract Term

- » The term of the resulting agreement is expected to be three (3) years with the option at DHCS' sole discretion to extend the contract up to three (3) optional, one-year (1) Contract Extension Phases



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IFP Contents Highlights





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Interviews and Demonstrations

- » Top three (3) highest scoring Proposers following Stage 2 Narrative Proposal review will be invited to participate in Interviews and Demonstrations
 - » DHCS will provide in advance a set of Interview questions posed to invited Proposers
 - » Demonstration Scenarios have been provided as part of the Data Library for Proposal preparation – also released in Administrative Bulletin 1, Addendum 1 on May 12, 2022
- » Interviews and Demonstrations are anticipated to occur between June 21st and 22nd and will comprise up to 50 maximum points in the overall PHM Service IFP Evaluation score



PHM Service IFP 21-10375

IFP SOW Operations Exhibit Highlights

Section 1 – Intake, Screening & Assessment

Govern all capabilities performed through the PHM Service Intake, Screening, and Assessment requirements including consent management and registration. Capabilities are document by stakeholder needs, like MCOs, HDPs, and BPs

Section 2 – Care Coordination & Planning

Describes objectives and scope for the PHM Service care coordination and planning capabilities to improve the ability for MCOs, HDPs, and BPs to identify the health, equity, and social needs of beneficiaries and identify gaps in beneficiary program eligibility

Section 3 – Population Health Management

Describes objectives, scope, and requirements related to population health management, including support for disease and condition surveillance, risk stratification and segmentation, as well as PHM programs in collaboration with DHCS



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IFP SOW Operations Exhibit Highlights

Section 4 – Beneficiary & Stakeholder Engagement

Covers capabilities such as information access, education and communications, and beneficiary and stakeholder relations. Information access is focused on access to a more integrated, complete information about the beneficiaries' health including care plans, benefits, program eligibility, referrals, and enrollment

Section 5 – Enterprise Relationship Management

Enterprise Relationship Management capabilities focused on exchange of information and the interactions between and among the PHM Service. Integrates all necessary components required to identify and categorize stakeholders, beneficiaries, and allow for effective communication between users

Section 6 – Advanced Data & Analytics

Describes the requirements for the PHM Service to receive, link, consolidate, enrich, and store data from both internal and external sources from the different stakeholders. Also includes requirements on risk stratification and segmentation algorithms, program analysis, reporting and key performance metrics



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IFP SOW Operations Exhibit Highlights

Section 7 – Quality, Performance Management

Defines the responsibility for developing and implementing required activities across the PHM Service to support continuous improvement to meet critical business needs across a variety of stakeholders. Includes the alignment and support of enterprise governance processes as a tenant of the PHM Service

Section 8 – Regulatory & Compliance

Describes objectives, scope, and requirements related to the Regulatory and Compliance capabilities of the PHM Service, including data retention requirements

Section 9 – Business Support Service

Outlines the requirements needed for ensuring that the Contractor's PHM Service facility(ies) are safe and securely protected, and that all information designated as confidential be maintained, secure from breach, and not provided to parties not authorized to have access to such information



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Submitting Proposer Questions



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Submitting Proposer Questions



How to Submit

Submit inquiries by emailing CDRFP15@dhcs.ca.gov, with subject line "Questions – IFP 21-10375"



What to Include in the Inquiry

- Inquirer information, including name of firm submitting the inquiry, mailing & email addresses, and phone number
- A description of the subject or issue in question or discrepancy found
- Document, section number, and page number (be specific and include other useful information on the problem or issue)
- Format questions using the table template. **Microsoft Word format is mandatory.** Please see section **IFP Main, Section G. Proposer Questions** for further instructions.



PHM Service IFP 21-10375

Submitting Proposer Questions



Submission Deadline

Proposer questions are due no later than 4:00 PM, May 18, 2022; as indicated in IFP Main.



DHCS Response

Following the question submission deadline, DHCS will summarize all general questions and issues raised and intends to post the summary of questions and responses on the Cal eProcure site on or about May 23, 2022.

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Review Key Dates

PHM Service IFP 21-10375

Procurement Time Schedule

Event	Date & Time (If applicable) *
IFP Released	May 9, 2022
Voluntary Post-IFP Release Proposal Web Conference	May 16, 2022 (10:00 a.m. – 11:30 a.m. PT)
IFP Question Due	May 18, 2022 (4:00 p.m. PT)
IFP Voluntary Letter of Intent	May 18, 2022 (4:00 p.m. PT)
Proposal Due Date	June 6, 2022 (4:00 p.m. PT)
Notice of Intent to Award Posted	July 7, 2022
Contract Award Date	July 15, 2022
Proposed Start Date of Contract	August 1, 2022

* *Dates subject to change*



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Q&A Session



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Q&A DHCS Session Panelist

- » **Panelist # 1**, Aita Romain, Quality & Population Health Management Division
- » **Panelist # 2**, Anantha Kadur, Program Manager, PHM
- » **Panelist # 3**, Collin Yee, Contracts Division
- » **Panelist # 4**, Christine Templeman, Contracts Division
- » **Panelist # 5**, Christina Soares, Contracts Division



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Q&A Session Format

- » Questions must be IFP-related
- » DHCS statements made during this web conference are non-binding
- » If you would like to ask a question, it must be typed into the WebEx chat box and sent to 'All Panelists'
- » Questions submitted to 'Everyone' or directly to an individual will not be addressed



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Concluding Remarks



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Concluding Remarks

- » Webinar Slide Deck will be posted to the CD website no later than **4:00 p.m. PT May 20, 2022**
- » Email questions and comments to CDRFP15@dhcs.ca.gov by **4:00 p.m. PT May 18, 2022**
- » IFP information is available on the CD website at:
https://www.dhcs.ca.gov/provgovpart/rfa_rfp/Pages/CDphmHOME.aspx



PHM Service IFP 21-10375

Resources

- » Cal eProcure event: <https://caleprocure.ca.gov/event/4260/21-10375>
- » Data Library access will be granted upon request per IFP Appendices 1.0-1.4.

**Population Health Management (PHM)
Services Invitation for Proposal
(IFP) 21-10375 Web Conference**

***Thank you for your
participation***