

Request for Resume (RFR) for Senior Subject Matter Expert CATS+ Master Contract

Section 1 –General Information			
RFR Number: (Reference BPO Number)	M00B5400224		
Functional Area (Enter One Only)	Functional Area 10 – IT Management Consulting Services		
Labor Category/s			
<i>A single support staff or support groups of up to five members may be engaged for up to six months without renewal options. Awards for Major IT Development Project (MITDP)/Program Manager/Deputy PMs may have tenure of one base year with up to two optional years, or through the end of the project within the Master Contract term. An RFR is limited to only labor categories defined in the CATS+ RFP.</i>			
<i>Enter the labor category/s to be provided:</i>			
1. Senior Subject Matter Expert			
Anticipated Start Date	October 1, 2014		
Duration of Assignment	Up to 6 months (Note: 600 hours, not full-time)		
Designated Small Business Reserve?(SBR): (Enter “Yes” or “No”)	Yes.		
MBE Goal, if applicable	0%		
Issue Date: mm/dd/yyyy	<i>08/21/2104</i>	Due Date: mm/dd/yyyy	<i>09/11/2014</i>
		Time (EST): 00:00 am/pm	<i>Noon, 12:00 PM Local time</i>
Place of Performance:	Maryland Department of Health and Mental Hygiene (DHMH) 201 W. Preston St. Baltimore, MD 21201		
Special Instructions: (e.g. interview information, attachments, etc.)	Interview location: 201 W. Preston St., Baltimore, MD 21201		
Security Requirements (if applicable):	ID Badge or Guest Pass necessary		
Invoicing Instructions (PLEASE REVIEW, DO WE NEED?)			
Invoices shall be submitted by the TO Contractor on a monthly basis by the 15 th business day of each month for all work completed in the previous month.			
Invoice payments to the TO Contractor shall be governed by the terms and conditions defined in the CATS+ Master Contract. Proper invoices for payment shall contain the TO Contractor’s Federal Employer Identifications Number (FEIN), as well as the information described below, and shall be submitted to the TO Manager for payment approval.			
Section 2 – Agency Procurement Officer (PO) Information			

Request for Resume (RFR) for Senior Subject Matter Expert CATS+ Master Contract

Agency / Division Name:	Maryland Department of Health and Mental Hygiene (DHMH)		
Agency PO Name:	Susan Harrison	Agency PO Phone Number:	410-767-1434
Agency PO Email Address:	susan.harrison@maryland.gov	Agency PO Fax:	410-333-5620
Agency PO Mailing Address:	DHMH 201 W. Preston St. Unit 79, Rm. 214 Baltimore, MD 21201		

Section 3 – Scope of Work

Background

Background

The State of Maryland’s Department of Health and Mental Hygiene (DHMH) is participating in a grant project that includes a field test of the Home and Community Based Services (HCBS) Experience of Care (EoC) survey instrument and explores the use of a Personal Health Record (PHR) with beneficiaries within Community-Based Long Term Services and Supports (CB-LTSS) programs . This project is funded under the Centers for Medicare and Medicaid Services (CMS) and is titled: Testing Experience and Functional Assessment Tools (TEFT), or the TEFT grant.

DHMH is the single state entity in charge of implementing the Medicaid Program in Maryland. The Project Manager for the development and implementation of the TEFT grant is a Deputy Director within DHMH’s Administration of Long Term Care and Community Support Services Administration.

Field Test a Beneficiary Experience Survey

The populations offered for participation in the field test include Maryland’s 1915c waiver for the aged and disabled, the 1915c waiver for individuals with traumatic brain injury, and the state plan Community First Choice (CFC) population.
grant.

Demonstrate the Use of Personal Health Records (PHRs) and Standards Integration

This portion of the project will focus on a coordinated approach to PHR infrastructure and will test the uptake and usage of the e-LTSS standard, the harmonization of e-LTSS standards with the Office of National Coordinator’s (ONC’s) Standards and Interoperability (S&I) Framework, and its interoperability with the State’s Health Insurance Exchange (HIE) infrastructure/framework.

Scope of Work

The Offeror will perform an environmental scan on the populations that will be receiving the Home and Community Based Services (HCBS) Experience of Care (EoC) survey during Phase 1 of the TEFT grant. The populations that will be sampled and participate in the survey interviews include the participants of the Community First Choice (CFC) and Brain Injury Waiver programs. The goal of the environmental scan is to gather data and information on the feasibility of adopting or creating an electronic Personal Health Record (PHR) to incorporate within the Long Term Services and Supports (LTSS) programs. The goal is to obtain data on who would be interested in connecting their PHR or Personal Health Information (PHI) to Electronic Health Records (EHRs) and/or Electronic Medical Records (EMRs), and incorporating these capabilities within the Health Insurance Exchange (HIE).

Request for Resume (RFR) for Senior Subject Matter Expert CATS+ Master Contract

Job Description/s	
Labor Category/s (From Section 1 Above)	Duties / Responsibilities
1. Senior Subject Matter Expert	<p>This position reports directly to the Project Manager and is responsible for functional aspects of the TEFT project environmental scan.</p> <p>Duties include:</p> <ul style="list-style-type: none"> - Stakeholder assessment(s) - Technology assessment(s) and recommendation(s) - Recommending solutions and how said solutions would integrate with the Health Insurance Exchange (HIE) and Long Term Care (LTC) or Long Term Services and Supports (LTSS) provider systems <p><i>See Attachment 3 for a detailed description of duties, responsibilities and deliverables.</i></p>
Minimum Qualifications	
<p>For minimum qualifications, see the labor category description in the CATS+ RFP for the subject RFR labor category. In addition, qualified candidates <u>must</u> meet the minimum qualifications specified below. Candidates that do not meet minimum qualifications will be deemed not reasonably susceptible for award and will not progress to full evaluation.</p>	
Labor Category/s (From Section 1 Above)	Minimum Qualifications
1. Senior Subject Matter Expert	<p>Education:</p> <ul style="list-style-type: none"> • Bachelor’s Degree from an accredited college or university in Engineering, Computer Science, Information Systems, Business or other related discipline. A Master’s Degree or Ph.D. Degree is preferred. <p>General Experience:</p> <ul style="list-style-type: none"> • At least twelve (12) years of relevant industry experience in the discipline is required. • At least ten (10) years of combined new and related older technical experience in IT related projects. Three (3) years of technical experience in IT related projects must have occurred in the last five (5) years. <p>Specialized Experience:</p> <ul style="list-style-type: none"> • At least ten (10) years of combined new and related older technical experience in the IT field directly related to the required areas of expertise. • At least five (5) years of experience in Health IT related projects. • At least two (2) years of government related experience (State or Federal). • Must demonstrate a role in at least three (3) successful projects that were delivered on time and on budget. • Five (5) or more years project experience developing functional (non-technical) requirements for implementing IT systems for private or public sector organizations.
Preferred Qualifications	
<p>The additional Experience/Knowledge/Skills listed below are preferred by the State.</p>	
Labor Category/s	Preferred Qualifications
2. Senior Subject Matter Expert	<p>Duties:</p> <ul style="list-style-type: none"> • Stakeholder assessment(s) • Technology assessment(s) and recommendation(s)

Request for Resume (RFR) for Senior Subject Matter Expert CATS+ Master Contract

	<ul style="list-style-type: none"> • Recommending solutions and how said solutions would integrate with the Health Insurance Exchange (HIE) and provider systems <p>General Experience:</p> <ul style="list-style-type: none"> • At least three (3) years of experience with environmental scans for products and services • At least three (3) years of experience with Personal Health Information (PHI) or Personal Health Records (PHRs) • At least two (2) years of experience with the Health Insurance Portability and Accountability Act (HIPAA) • At least two (2) years of experience with Electronic Health Records (EHRs) or Electronic Medical Records (EMRs)
--	--

<p>Section 4 - Required Submissions</p> <p>NOTE:</p> <ul style="list-style-type: none"> – Master Contractors may propose only one candidate for each position requested. – Master Contractors electing not to propose in response to the RFR must submit a “Master Contractor Feedback Form” via the “Master Contractor Login” on the CATS+ web site. – Master Contractors proposing in response to the RFR must submit the documents below as separate files contained in two separate emails as follows: <p>Email 1 of 2 with “Technical”: Master Contractor Name, RFR number, & candidate name in the subject line</p> <ul style="list-style-type: none"> • Resume for each labor category described in the RFR (Attachment 1) • Three (3) current references that can be contacted for performance verification of the submitted consultant’s work experience and skills. Telephone number and email address of reference is needed. <p>Email 2 of 2 with “Financial”: Master Contractor Name, RFR number, & candidate name in the subject line</p> <ul style="list-style-type: none"> • Price Proposal (Attachment 2) • Conflict of Interest Affidavit (Attachment G in the CATS+ RFP) • Living Wage Affidavit (Attachment I in the CATS+ RFP)

1.
2.
3.

<p>Section 5 – Evaluation Criteria –</p> <p>Candidates meeting the Minimum Qualifications listed in Section 3 above will be evaluated for overall best value, as follows: (Provide a list of evaluation criteria in descending order of importance)</p>
1. Relevant IT project experience
2. Training and education
3. Price

<p>Basis for Award Recommendation</p> <p>The Agency PO will recommend award to the Master Contractor whose proposal is determined to be the most advantageous to the State, considering price and the evaluation factors set forth in the RFR. The Agency PO will initiate and deliver a Task Order Agreement to the selected Master Contractor. Master Contractors should be aware that if selected, State law regarding conflict of interest may prevent future participation in procurements related to the RFR Scope of Work, depending upon specific circumstances.</p>
--

Request for Resume (RFR) for Senior Subject Matter Expert CATS+ Master Contract

ATTACHMENT 1 RFR RESUME FORM RFR # M00B5400224

Instructions: Enter resume information in the fields below; do not submit other resume formats. Submit only one resume per Labor Category described in Section 1 of the RFR. If the RFR requests multiple Labor Categories, use a separate resume form for each proposed candidate.

Labor Category Senior Subject Matter Expert
(from Section 1 of the RFR)

Candidate Name:

Master Contractor:

A. Education / Training

Institution Name / City / State	Degree / Certification	Year Completed	Field Of Study
<add lines as needed>			

B. Relevant Work Experience

Describe work experience relevant to the Duties / Responsibilities and Minimum Experience / Knowledge / Skill described in Section 3 of the RFR. Starts with the most recent experience first; do not include non-relevant experience.

[Organization] Description of Work...

[Title / Role]

[Period of Employment / Work]

[Location]

[Contact Person (Optional if current employer)]

[Organization] Description of Work...

[Title / Role]

[Period of Employment / Work]

[Location]

<add lines as needed>

C. Employment History

List employment history, starting with the most recent employment first

Start and End Dates	Job Title or Position	Organization Name	Reason for Leaving
<add lines as needed>			

D. References

List persons the State may contact as employment references

Reference Name	Job Title or Position	Organization Name	Telephone / Email
<add lines as needed>			

*"Candidate Relevant Experience" section must be filled out. Do not enter "see resume" as a response.

Request for Resume (RFR) for Senior Subject Matter Expert CATS+ Master Contract

Proposed Individual's Name/Company:	How does the proposed individual meet each requirement?
LABOR CATEGORY TITLE – SENIOR SUBJECT MATTER EXPERT	
Requirement	Candidate Relevant Experience*
Education: <ul style="list-style-type: none"> Bachelor's Degree from an accredited college or university in Engineering, Computer Science, Information Systems, Business or other related discipline. A Master's Degree or Ph.D. Degree is preferred. 	Education:
General Experience: <ul style="list-style-type: none"> At least twelve (12) years of relevant industry experience in the discipline is required. At least ten (10) years of combined new and related older technical experience in IT related projects. Three (3) years of technical experience in IT related projects must have occurred in the last five (5) years. 	General Experience:
Specialized Experience: <ul style="list-style-type: none"> At least ten (10) years of combined new and related older technical experience in the IT field directly related to the required areas of expertise. At least five (5) years of experience in Health IT related projects. At least two (2) years of government related experience (State or Federal). Must demonstrate a role in at least three (3) successful projects that were delivered on time and on budget. Five (5) or more years project experience developing functional (non-technical) requirements for implementing IT systems for private or public sector organizations. 	Specialized Experience:

The information provided on this form for this labor category is true and correct to the best of my knowledge:

Master Contractor Representative:

Print Name

Signature

Date

Proposed Individual:

Signature

Date

**Request for Resume (RFR) for Senior Subject Matter Expert
CATS+ Master Contract**

**ATTACHMENT 2
PRICE PROPOSAL
RFR #M00B5400224**

(This form is to be filled out by Master Contractors - Submit with the Financial Response)

Period 1 (July 1, 2014 – January 1, 2015)				
CATS+ Labor Category		A	B	C
		Fully Loaded Hourly Labor Rate	Evaluation Hours	PERIOD 1 Evaluation Price (A x B)
Senior Subject Matter Expert		\$	600	\$
Total Period 1 Evaluation Price:				
Total RFR Price:				\$

_____	_____
Authorized Individual Name	Company Name
_____	_____
Title	Company Tax ID #

*The Agency reserves the right to award each individual position at either the proposed Annual Labor Rate or proposed Hourly Labor Rate. The Annual Labor Rate requires a minimum of 1920 hours worked annually. The Hourly Labor Rate cannot exceed the Master Contract rate, but may be lower. Both rates must be fully loaded, all inclusive, and shall include all direct and indirect costs for the Master Contractor to perform under the TOA. Evaluation Hours are for evaluation purposes only and do not represent actual hours to be worked or invoiced.

**ATTACHMENT 3
RFR #M00B5400224
SENIOR SUBJECT MATTER EXPERT
DUTIES & RESPONSIBILITIES**

1. ROLE DEFINITIONS	
The purpose of this section is to distinguish among the roles interacting with the Senior Subject Matter Expert obtained through this RFR.	
A.	Task Order (TO) Procurement Officer – State staff person responsible for managing the RFR process resulting in a TO Agreement for TO Contractor up to the point of TO award.
B.	TO Manager – State staff person who oversees the Senior Subject Matter Expert’s work performance and administers the TO once it is awarded.
C.	TO Contractor – The CATS+ Master Contractor awarded a TO as a result of this RFR. The TO Contractor shall provide the Senior Subject Matter Expert resource and be accountable for Senior Subject Matter Expert work performance under the TO.
D.	Senior Subject Matter Expert - The person provided by the TO Contractor as a result of this RFR. The Senior Subject Matter Expert is responsible for overall functional project planning and execution. The Senior Subject Matter Expert is responsible for performing the duties and responsibilities described in Attachment 3, and for completing all requirements and deliverables under the TO. The Senior Subject

Request for Resume (RFR) for Senior Subject Matter Expert CATS+ Master Contract

	Matter Expert reports to the Senior Project Manager and shall oversee and direct the Functional Project Teams members made up of State and contractual personnel.
E.	Other Project Contractors – The Contractors responsible for project implementation, including their PM and other personnel assigned to the project. The Contractors report to the PM for project purposes with oversight by the TO Manager.
2. SENIOR SUBJECT MATTER EXPERT DUTIES AND RESPONSIBILITIES	
<p>The Senior Subject Matter Expert shall work with the functional project team comprised of current State and contractual personnel to complete the following duties:</p> <ul style="list-style-type: none"> - Stakeholder assessment(s) - Technology assessment(s) and recommendation(s) - Recommending solutions and how said solutions would integrate with the Health Insurance Exchange (HIE) and provider systems - Define requirements, perform analyses, and develop plans and requirements for systems <p>In addition:</p> <ul style="list-style-type: none"> - The area of expertise may be related to information technology, health care, and environmental scans for products and services - This requires expertise in the formulation of specifications and in the execution of technical initiatives in vertical areas 	
Senior Subject Matter Expert Duties	
An asterisk (*) by the section number below and bold italics identifies a deliverable associated with the duty / responsibility. Refer to Section 7 for full descriptions of all deliverables and time of performance.	
2.1	Become thoroughly knowledgeable on all aspects of the Project including technical knowledge of software applications being utilize by the project.
3. REQUIRED PROJECT POLICIES, GUIDELINES AND METHODOLOGIES	
<p>The Senior Subject Matter Expert shall keep informed of and comply with all applicable laws, regulations, policies, standards and guidelines affecting information technology projects applicable to activities and obligations under the TO Agreement, as those laws, policies, standards and guidelines may be amended from time to time.</p> <p>The Senior Subject Matter Expert shall adhere to and remain abreast of current, new, and revised laws, regulations, policies, standards and guidelines affecting project execution and it shall obtain and maintain, at its expense, all licenses, permits, insurance, and governmental approvals, if any, necessary to the performance of its obligations under the TO Agreement.</p> <p>The Senior Subject Matter Expert shall comply with all standards and guidelines for the following:</p>	
A.	Personal Health Information (PHI) and/or Personal Health Records (PHRs)
B.	The Health Insurance Portability and Accountability Act (HIPAA)
C.	The Home and Community Based Services (HCBS) Experience of Care (EoC) survey instrument
D.	The Centers for Medicare and Medicaid Services (CMS) Testing Experience and Functional Tools (TEFT) grant
E.	The State’s Electronic Health Record (EHR) Incentive Program
F.	The State’s IT Security Policy and Standards at: www.DoIT.maryland.gov - keyword: Security Policy.
4. SENIOR SUBJECT MATTER EXPERT DELIVERABLES AND TIME OF PERFORMANCE	

Request for Resume (RFR) for Senior Subject Matter Expert CATS+ Master Contract

Note – for each of the written deliverables below, ongoing quality will be a factor in the Monthly Performance Rating described in Section 4 above.

ID #	Deliverable Description	Acceptance Criteria	Time of Performance
4.1	<i>Resume</i>	Complete and applicable resume	
4.2	<i>Corporate Capabilities</i>	Corporate or business capabilities that demonstrate experience relative to project	
4.3	<i>Methodology</i>	Methodology and approach to carrying out the environmental scan	
4.4	<i>Schedule</i>	Schedule/Timetable for project	

(The rest of this page was left intentionally blank)