Michigan Department of Health and Human Services
Behavioral and Physical Health and Aging Services Administration (BPHASA)

Community Health Worker Credentialing
Request for Proposals

Issued By
Michigan Public Health Institute

Issued on: June 26, 2023
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Section 1.0 Introduction

1.1 General Information
The Michigan Public Health Institute (MPHI) is soliciting competitive, responsive proposals from experienced and financially sound organizations to create, implement and maintain a registry and a standard evidence-based credentialing process for Community Health Workers (CHWs) in Michigan, including a periodic interface file to the Community Health Automated Medicaid Processing System (CHAMPS). The selected vendor will provide ongoing monitoring of CHW credentials to ensure competence and compliance with Michigan Medicaid regulations.

1.2 Agencies

MDHHS
The Michigan Department of Health and Human Services (MDHHS) provides a variety of services to the residents in all 83 Michigan counties. MDHHS provides services and administers programs to improve the health, safety, and prosperity of the residents of the state of Michigan.

BPHASA
The Behavioral and Physical Health and Aging Services Administration (BPHASA) combines Michigan's Medicaid office, services for aging adults, and community-based services for adults with intellectual and developmental disabilities, serious mental illness, and substance use disorders under one umbrella within MDHHS. This structure integrates MDHHS teams that focus on aging and long-term care issues, deliver services to adults with mild to moderate mental illness, and administer the state's Medicaid programs, allowing cross-functional teams to develop innovative policies that benefit our state and its residents.

MPHI
MPHI is a Michigan non-profit 501(c)(3) Corporation authorized under Public Act 264 of 1989 as a cooperative venture of the State of Michigan Department of Health and Human Services (MDHHS), the University of Michigan, Michigan State University, and Wayne State University, to plan, promote, and coordinate all facets of health care services. MPHI currently administers several business and information technology initiatives on behalf of its clients.

Section 2.0 Scope of Work

2.1 Objective
Community Health Workers (CHWs) are non-licensed public health providers who facilitate access to needed health and social services for beneficiaries. CHW services focus on preventing disease, disability, and other chronic health conditions or their progression, and promoting physical and mental health.

BPHASA has an interest in ensuring that CHWs who seek to offer Medicaid-reimbursable services meet credentialing criteria to serve their communities. To this end, it seeks a partner that can design, implement, and maintain an electronic registry of CHWs in Michigan who intend to apply for provider enrollment in the Community Health Automated Medicaid Processing System (CHAMPS) for Medicaid reimbursement. In addition, the vendor will be expected to create and maintain a list of qualified CHW
training programs and providers and to collect and verify the credentials submitted to the registry by CHWs.

Individual CHWs will use this registry to document and maintain their credentials in accordance with Michigan Medicaid Policy.

Provider enrollment in CHAMPS is a distinct and separate process from the CHW registry. The registry will be used by the Michigan Medicaid Agency to validate that individual CHWs who apply for provider enrollment meet the criteria set forth in Michigan Medicaid Policy.

2.2 Business Requirements

1. The selected vendor will provide expertise in how the CHW profession is formally recognized and certification requirements for Medicaid reimbursement.
   a. The selected vendor is expected to have subject matter expertise on the CHW profession and will stay abreast of new regulations, laws, and accreditation standards as well as assist BPHASA in designing, implementing, and assessing programs and processes.
   b. The selected vendor will be responsive to changes in regulations, law, and accreditation standards and will update the CHW registry as required to accommodate changes (e.g. policy, regulatory, other).
   c. The selected vendor will monitor expiration dates and other factors that could limit provider qualification per MI Medicaid policy.
   d. The selected vendor will consult with BPHASA before implementing changes in processes or the registry.
   e. The selected vendor will develop recommendations for enhancing or adapting credential review and verification processes.

2. The selected vendor will design a registration process for CHWs in collaboration with BPHASA.

3. The selected vendor will develop CHW registration instructions in collaboration with BPHASA.

4. The solution will capture submissions from CHWs that document their completion of credentialing requirements, such as:
   a. The core competency training program.
   b. Experiential learning hours.
   c. Continuing education credit hours.

5. The selected vendor will design and implement a formal process to review and approve CHW training curriculum/programs in accordance with Michigan Medicaid policy.

6. The selected vendor will verify individual CHW qualifications. BPHASA will work with the selected vendor to refine the verification and validation process.
   a. The selected vendor will obtain written verification of CHW Core Competency training completion.
   b. The selected vendor will obtain evidence of completed experiential learning requirements. These requirements may include paid or volunteer time delivering CHW-like services. An example of evidence may include a sponsor-signed letter that the candidate successfully completed X hours.
   c. The selected vendor will work with BPHASA to create and maintain a list of qualified CHW training providers/programs.
d. The selected vendor will obtain verification of continuing education and skills development.

e. The selected vendor will review each registration and its associated verifications looking for inconsistencies or gaps in information and report findings.

f. The selected vendor will assemble all information into a credentials file per Michigan Medicaid policy and Provider Enrollment operations instructions.

7. The selected vendor must create an electronic registry of qualified CHWs. The vendor will be required to host or subcontract the hosting service.
   a. The registry will capture necessary CHW demographic information such as Name, Date of Birth, Social Security Numbers, and National Provider Identifier (NPI).
   b. The selected vendor will protect confidential information about individual CHW providers and their credentials.
   c. The electronic registry must safeguard and secure Personally Identifiable Information (PII).

8. The registry must be able to transmit a file to the CHAMPS system.
   a. The file must be a fixed length flat file with a standard header and trailer. The file specifications will be provided after the contract has been awarded.
   b. The selected vendor will electronically transmit registrant information/credential files per provider enrollment operations instructions.
   c. The selected vendor will aggregate all credential files per provider enrollment operations instructions.

9. The selected vendor must comply with the MDHHS non-discrimination policy and not discriminate against any individual or group based on race, national origin, color, sex, disability, religion, age, height, weight, familial status, partisan considerations, or genetic information.

2.3 Project Deliverables

Specific Deliverables
1. A Work Breakdown Structure (WBS) for all activities related to the project including milestones and projected completion dates. The WBS will be due within 10 business days of the project start date.
2. A documented and complete process to review and approve CHW training curriculums/programs.
3. A design document for the electronic registry.
4. A maintenance plan and Service Level Agreement (SLA) for the electronic registry.
5. A design document for the file to CHAMPS.
6. Successful implementation of the electronic registry.
7. Successful implementation of the file to CHAMPS.
8. Registration instructions for CHWs.
9. Monthly status reports providing updates on the project.

General Deliverables
All deliverables must meet BPHASA-approved format and content requirements.

Each deliverable will be reviewed by BPHASA and will require formal, written approval from BPHASA before acceptance of the deliverable. The bidder will allow for a minimum of ten business days following
receipt, per deliverable, for BPHASA to review each deliverable and document its findings, except as otherwise specified. Based on the review findings, BPHASA may accept the deliverable, reject portions of the deliverable, reject the complete deliverable, or require that revisions be made. The bidder will make all changes directed by BPHASA. Unless otherwise agreed to by BPHASA in writing, the bidder must submit replacement portions or a complete revised version of the deliverable within five business days following receipt of BPHASA comments. BPHASA will have an additional five business days for review whenever replacement portions or a complete revised version of a deliverable are resubmitted.

The bidder must employ an internal quality control process to ensure that all deliverables, documents, and calculations are complete, accurate, easy to understand, and of high quality. The bidder must provide deliverables that, at a minimum, are responsive to the specific requirements, organized into a logical order, contain no spelling or grammatical errors, are formatted uniformly, and contain accurate information and correct calculations. The bidder will retain all draft and marked-up documents and checklists utilized in reviewing documents for reference through the duration of the project and project acceptance.

The bidder must document and deliver to BPHASA its responses to BPHASA’s comments and requests for revisions or clarification of deliverable contents.

At BPHASA’s request, the bidder will conduct a walk-through of selected deliverables. The walk-through will consist of an overview of the deliverables, explanation of the organization of the deliverables, presentation of critical issues related to the deliverables, and other information as requested by BPHASA.

If a due date for a deliverable falls on a day that is not a business day, then the due date will be automatically extended to the next business day, unless otherwise directed by BPHASA.

All due dates or timelines that reference a period of days will be measured in calendar days, months, and quarters unless specifically stated as business days or otherwise. All times stated in the contract will be considered to be in Eastern Time, adjusted for Daylight Saving Time as appropriate, unless specifically stated otherwise.

No deliverable, report, data, procedure, or system created by the bidder for BPHASA that is necessary to fulfill the bidder’s responsibilities under the contract will be considered proprietary.

Any document, deliverable, or other item delivered to BPHASA for review and approval will require written approval by BPHASA before the bidder may consider that document, deliverable, or other item approved.

Section 3.0 Bidder Requirements

3.1 Organization Experience and Qualifications
Interested bidders should articulate their qualifications and comment specifically on:

- Their subject matter expertise regarding CHWs.
- Their ability to design and implement an electronic registry.
- The organization must demonstrate infrastructure and sustainability, with a minimum of three years in business.
• The organization must demonstrate the ability to protect the security and privacy of sensitive data and personally identifiable information (PII) and follow federal and state laws and regulations, including but not limited to, the federal NIST Standards.

3.2 Project Personnel

Key Personnel
The bidder may subcontract portions of the work.

The bidder must propose sufficient key personnel to perform the work within the time constraints of the project.

The proposal must include a table of proposed key personnel, their roles in the project, and their qualifications to perform the work. Resumes of proposed key personnel must be included as appendices to the proposal.

The bidder will obtain written approval from BPHASA for individuals proposed for assignment to key personnel positions.

The bidder must not change individuals in key personnel positions without prior written approval of BPHASA. The bidder will supply BPHASA with the name(s), resume(s), and references for any proposed replacement whenever there is a change to key personnel. Any individual replacing key personnel must have qualifications that are equivalent to or exceed the stated qualifications for the position, unless otherwise approved in writing by BPHASA.

The bidder must maintain appropriate staffing levels throughout the term of the contract.

Personnel Availability
The bidder’s key personnel must be available for all regularly scheduled meetings between the bidder and BPHASA. Meetings will take place remotely.

The bidder must ensure that the staff attending all meetings between BPHASA and the bidder have the authority to represent and commit the bidder regarding work planning, problem resolution, and program development.

At BPHASA’s direction, the bidder must make its key personnel assigned to the contract available to attend meetings as subject matter experts with stakeholders, both within the State government and with external or private stakeholders.

The bidder will respond to all telephone calls, voicemails, and emails from BPHASA within three business days of receipt by the bidder.

3.3 General Requirements

MPHI will contract with only one organization, the bidder, and will work solely with that organization with respect to all tasks and deliverables to be completed, services to be rendered, and performance standards to be met.

The bidder may subcontract to complete any portion of the work. However, if the bidder chooses to subcontract, they must provide – in writing – a description of which specific portions of the scope of work and deliverables are being completed by a subcontractor. In this case, the bidder will be required
to submit names of all key personnel and organizational information for the subcontractor as articulated in Sections 3.1 and 3.2.

The bidder may be privy to internal policy discussions, contractual issues, PII, and advance knowledge of legislation. The bidder must consider and treat any such information as confidential and must not disclose it to any third party without the written consent of BPHASA.

The bidder will work cooperatively with key BPHASA staff and, if applicable, the staff of other bidders during the contract period to ensure the success of the work. MPHI may, in its sole discretion, use other bidders to perform activities related to the work that are not contained in the contract.

The bidder will maintain complete and detailed records of all meetings, presentations, project artifacts, and any other interactions or deliverables related to the project described in the contract. The bidder will make such records available to BPHASA upon request throughout the term of the contract.

3.4 Communication Requirements

Communication with BPHASA
The bidder will enable all bidder staff to exchange documents and electronic files with BPHASA staff in compatible formats. BPHASA currently uses Microsoft Office products. If the bidder uses a compatible program that is not Microsoft Office product, then the bidder will ensure that all documents or files delivered to BPHASA are completely transferrable and reviewable, without error, on BPHASA’s systems.

Communication with Clients, Providers, and Other Entities
The bidder will not engage in any non-routine communication with any client, any provider, the media, any other BPHASA bidder, or the public without the prior written consent of BPHASA.

3.5 Conflict of Interest
All persons or companies who were directly or indirectly involved in preparing the RFP will be deemed to be in a conflict of interest and ineligible to bid.

If the bidder becomes aware of a conflict of interest relating to this contract, the bidder will inform BPHASA within one business day.

If the bidder has a conflict of interest at any point during the term of the contract, BPHASA may, in its sole discretion, terminate the bidder for cause.

3.6 Reporting Requirements
The bidder will provide monthly status reports containing the information requested by BPHASA.

During system development, monthly reports should include:

- The percentage of deliverables completed overall and during the month.

After the registration system is live, monthly reports should include information on:

- The number of submissions by CHWs completed.
- The number of CHWs for whom credentials are verified.
Section 4.0 Invoicing and Project Duration

4.1 Compensation
MPHI will pay the bidder upon BPHASA’s acceptance of each deliverable as described below:

- Work Breakdown Structure (WBS)
- Monthly Status Reports
- Acceptance by BPHASA of specific deliverables listed in Section 2.3.

4.2 Invoicing
The bidder will invoice MPHI on a monthly basis.

The invoice will contain the cost for each deliverable as a percentage of deliverable completed during the invoice month, if that percentage of the deliverable was accepted by BPHASA during the month that the invoice covers and was received by BPHASA’s required due date.

MPHI will remit payment to the bidder as described in the contract.

4.3 Project Duration
The project start date will be October 1, 2024. The end date has not been determined.

Section 5.0 Evaluation Methodology

5.1 Evaluation Committee
An Evaluation Committee will be established using measures to ensure the integrity of the evaluation process. These measures include the following:

- Selecting committee members who do not have a conflict of interest regarding this solicitation.
- Facilitating the independent review of proposals.
- Ensuring the fair and impartial treatment of all proposals.

The objective of the Evaluation Committee is to conduct reviews of the proposals that have been submitted, to hold frank and detailed discussions among themselves, and to recommend a consultant for a contract award.

The Evaluation Committee will conduct a comprehensive, thorough, complete, and impartial evaluation of each proposal received.

5.2 Evaluation Process
The evaluation of proposals will result in a recommendation for award of the contract. The contract will be awarded to the responsive and responsible bidder who offers the best value, as determined by the Evaluation Committee. In determining best value, the Evaluation Committee will consider:

- Demonstrated experience.
- Quality of proposal and approach.
- Experience of proposed personnel.
- Cost.
MPHI will evaluate proposals to determine if each bidder met all mandatory experience and qualification requirements. The mandatory experience requirements are scored on a Met/Not Met basis and only those proposals that meet all mandatory requirements will be considered.

The proposals that pass the Met/Not Met review will then be evaluated by the Evaluation Committee and rated for potential award. Rating will be based on the evaluator’s assessment of the proposal, including whether all critical elements described in the solicitation have been addressed, the capabilities of the bidder, the qualifications of the resources proposed, and any other aspect determined relevant by BPHASA. Rating will be conducted according to the table below.

<table>
<thead>
<tr>
<th>Rating</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Response demonstrates no compliance with the requirement.</td>
</tr>
<tr>
<td>1</td>
<td>Response demonstrates minimal compliance with the requirement.</td>
</tr>
<tr>
<td>2</td>
<td>Response demonstrates acceptable compliance with the requirement.</td>
</tr>
<tr>
<td>3</td>
<td>Response demonstrates exceptional compliance with the requirement.</td>
</tr>
</tbody>
</table>

The Evaluation Committee will rank the proposals from the highest to the lowest rating and then select the top scores to evaluate the price and consider for award.

The Evaluation Committee may consider prior performance with BPHASA and/or MPHI in making its award decision.

The Evaluation Committee may enter into negotiations with one or more bidders on price, terms, technical requirements, or other deliverables.

The Evaluation Committee may, if it deems necessary, request that a bidder provide a clarifying written response, engage in discussion, or make an oral presentation. The Evaluation Committee may adjust its scoring based on the results of such activities. However, proposals may be reviewed and determinations made without such activities. Bidders should be aware that the opportunity for further explanation might not occur; therefore, it is important that proposal submissions are complete.

**5.3 Evaluation Criteria**

The evaluation criteria to be used in evaluating proposals and recommending an award from this solicitation are as follows:

<table>
<thead>
<tr>
<th>Mandatory Requirements</th>
<th>Met / Not Met</th>
</tr>
</thead>
<tbody>
<tr>
<td>The response includes a statement that the consultant is not debarred, suspended, or other prohibited from professional practice by any Federal, State, or Local Agency.</td>
<td></td>
</tr>
<tr>
<td>The bidder must have been in business for a minimum of 3 years.</td>
<td></td>
</tr>
<tr>
<td>The response demonstrates that the bidder has the financial strength to maintain a contract resulting from this solicitation.</td>
<td></td>
</tr>
</tbody>
</table>
### Evaluation Criteria

<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Possible Ratings</th>
</tr>
</thead>
<tbody>
<tr>
<td>The response demonstrated experience in performing similar projects in other contexts.</td>
<td>0, 1, 2, or 3</td>
</tr>
<tr>
<td>The response demonstrated the bidder’s understanding of the scope of the work.</td>
<td>0, 1, 2, or 3</td>
</tr>
<tr>
<td>The quality of the bidder’s approach to accomplishing BPHASA’s objective as outlined in the scope of work.</td>
<td>0, 1, 2, or 3</td>
</tr>
<tr>
<td>Proposed key personnel are qualified to perform the activities described in the scope of work.</td>
<td>0, 1, 2, or 3</td>
</tr>
<tr>
<td>The proposed budget and fees are reasonable to perform the work.</td>
<td>0, 1, 2, or 3</td>
</tr>
</tbody>
</table>

### 5.4 Compliance

It is the bidder’s responsibility to assure that the proposal is complete in accordance with the direction provided within all solicitation documents. Failure of a bidder to provide any required information and/or failure to follow the response format set forth in this RFP may result in disqualification of the proposal.

### Section 6.0 Sole Point of Contact

The sole point of contact for this request for proposals is:

Kristi Bente  
Business Analyst Manager  
Michigan Public Health Institute  
2436 Woodlake Circle, Suite 300  
Okemos, MI 48864  
kbente@mphi.org

### Section 7.0 Schedule of Activities

#### 7.1 Key Activities

The schedule of key activities for this request for proposals is as follows:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Posting Date</td>
<td>June 26, 2023</td>
</tr>
<tr>
<td>Questions Deadline</td>
<td>July 10, 2023</td>
</tr>
<tr>
<td>Respond to Questions and Answers</td>
<td>July 13, 2023</td>
</tr>
<tr>
<td>Proposal Submission Deadline</td>
<td>July 31, 2023</td>
</tr>
<tr>
<td>Notification of Award</td>
<td>September 1, 2023</td>
</tr>
<tr>
<td>Start Date (Estimated)</td>
<td>October 2, 2023</td>
</tr>
</tbody>
</table>

**MPHI reserves the right to revise the dates in this schedule.**
7.2 Questions
Questions regarding this request for proposals must be received by MPHI before 5:00 pm Eastern Daylight Time on July 10, 2023. Questions must be submitted by email to kbente@mphi.org.

Inquiries received by MPHI by the Questions Deadline will be responded to by MPHI via email and posted at https://mphi.org/rfp/. Questions received after the Questions Deadline will not be included in MPHI’s response.

7.3 Proposal Submission Deadline
Proposals must be received before 5:00 pm Eastern Daylight Time on July 31, 2023.

It is the responsibility of the bidder to ensure that MPHI receives the complete proposal on or before the proposal submission deadline.

Proposals received after the proposal submission deadline will not be considered.

7.4 Bidders’ Presentations
Bidders that submit timely bids and pass the mandatory requirements review may be invited to make a presentation during the response evaluation process. Presentations may take place in-person or remotely.

7.5 Disclaimer on Information in Solicitation
All statistical and fiscal information contained within this solicitation and its appendices and any amendments and modifications thereto reflect the best and most accurate information available to MPHI at the time of solicitation preparation. No inaccuracies in such data will constitute a basis for legal recovery of damages or protests, either real or punitive, except to the extent that any such inaccuracy was a result of intentional misrepresentation by MPHI.

7.6 Proposal and Pre-Contract Costs
MPHI is not liable for any costs incurred by bidders prior to issuance of a legally executed contract or procurement document. No property interest of any nature shall occur until a contract is awarded and signed by all concerned parties.

7.7 Cancellation
MPHI reserves the right to cancel this entire request for proposals or individual phases at any time, without penalty.

Section 8.0 Proposals

8.1 Solicitation Compliance / Proposal Rejection
Failure of a bidder to comply with or meet all requirements or respond to any additional requests for information may result in the bidder’s proposal being disqualified or determined not acceptable. MPHI reserves the right to reject any or all proposals for non-compliance, to waive informalities and minor irregularities in proposals received, and to accept any portion of a proposal or complete proposals if deemed in the best interest of BPHASA. Such disqualification or determination may occur at any point following the proposal submission deadline.
8.2 General Instructions
Bidders must adhere to the content required for proposal responses. The bidder’s proposal response and attachments will:

- Present writing that is responsive, succinct, self-explanatory, and well-organized on pages that are consecutively numbered and in a consistent numbering format.
- Be concise but provide complete responses.
- Present attachments that are labeled with wording related to the requirement or topic covered within the attachment.

8.3 Complete Proposal
A complete proposal must include the following:

- Table of Contents
- Executive Summary
  - The Executive Summary must be factual and should succinctly cover the core aspects of the bidder’s staffing, methodologies, and approaches to fulfill the scope of work within the solicitation.
- Proposal
  - The proposal must consist of the bidder’s full and complete response to the scope of work.
  - The proposal must include a proposed timeline in which the bidder will complete the work.
  - The proposal must include descriptions of bidder’s areas of expertise and experience in providing this type of work.
  - The proposal must include a summary table of proposed key personnel, their roles in the project, and their qualifications to perform the work.
  - The proposal must include the bidder’s fixed price proposal for the scope of work.
  - The proposal must include the cost breakdown for the project, separated by costs associated with the electronic registry and related activities and those associated with creating the process to review and approve CHW training curriculums/programs.
- Resumes Appendix
  - This appendix must include the resumes of all key personnel proposed for the project.
- Experience and References Appendix
  - This appendix must include descriptions and dates of at least three similar projects.
  - This appendix must include the names and contact information for at least three references.
- Financial Statement
  - The financial statement must be a separate document from the rest of the proposal.
  - The financial statement must include sufficient information to demonstrate that the bidder has the financial strength to maintain a contract resulting from this solicitation.
  - Financial information will be held in confidence by MPHI and only used to evaluate a bidder’s financial strength.
8.4 Proposal Submission
Proposals must be submitted via email to kbente@mphi.org as either Word or .pdf documents.

8.5 Modification or Withdrawal of Proposals
Proposals may not be modified after the submission date. Bidders may withdraw from consideration at any time during the selection process.

8.6 Binding Offer
A proposal submitted in response to this solicitation is a binding offer.

Section 9.0  Award and Contract

9.1 Notice of Intent to Award
The winning bidder will be notified via email and the award will be published on https://mphi.org/rfp/.

9.2 News Releases
News releases pertaining to this solicitation or intent to award shall not be made prior to the execution of the contract or without prior written approval by MPHI.