# Deloitte.

## PIECING TOGETHER THE PAST, PRESENT, AND FUTURE

## ORIGINAL TECHNICAL PROPOSAL PACKET 710-23-074 ELIGIBILITY SUPPORT SERVICES

Response to the State of Arkansas Department of Human Services Office of Procurement

May 8, 2024, 1:00 CST



## RESPONSE PACKET 710-23-074 Eligibility Support Services

## **RESPONSE SIGNATURE PAGE**

Type or print the following information.

PROSPECTIVE CONTRACTOR'S INFORMATION										
Company:	Deloitte Consulting LLP									
Address:	400 W. Capitol Avenue, Suite 900									
City:	Little Rock S			AR		Zip Code:	72201			
Business Designation:	□       Individual       □       Sole Proprietorship       □       Public Service Corp         ⊠       Partnership       □       Corporation       □       Nonprofit						)			
Minority and Women	<ul><li>Not Applicable</li><li>African American</li></ul>		<ul> <li>□ Service-Disabled Veteran</li> <li>□ Women-Owned</li> </ul>							
Owned	□ Asian American □ Pacific Islander American									
Designation*:	AR Certification #:	AR Certification #:* See Minority and Women-Owned Business Policy								
PROSPECTIVE CONTRACTOR CONTACT INFORMATION Provide contact information to be used for solicitation related matters.										
Contact Person:		Title:		Managing Director						
Phone:		Alternat	e Phone:							
Email:										
	CONFIRM		REDA		Y					
<ul> <li>YES, a redacted copy of submission documents is enclosed. NO, a redacted copy of submission documents is not enclosed. I understand a full copy of non-redacted submission documents will be released if requested.</li> <li>Note: If a redacted copy of the submission documents is not provided with Prospective Contractor's response packet, and neither box is checked, a copy of the non-redacted documents, with the exception of financial data (other than pricing), will be released in response to any request made under the Arkansas Freedom of Information Act (FOIA). See Solicitation Terms and Conditions for additional information.</li> </ul>										
ILLEGAL IMMIGRANT CONFIRMATION										
By signing and submitting a response to this Solicitation, a Prospective Contractor agrees and certifies that they do not employ or contract with illegal immigrants and shall not employ or contract with illegal immigrants during the term of a contract awarded as a result of this solicitation.										
ISRAEL BOYCOTT RESTRICTION CONFIRMATION										
By checking the box below, a Prospective Contractor agrees and certifies that they do not boycott Israel and shall not boycott Israel during the term of a contract awarded as a result of this solicitation.										
An official authorized to bind the Prospective Contractor to a resultant contract shall sign below. The signature below signifies agreement that any exception that conflicts with a Requirement of this										
	Solicitation may causese to be rejected.									
	Authorized Signature itle: <u>Managing Director</u>									
Printed/Type	u Name:		pa	ite: <u>May 8,</u>	2024					

## **SECTIONS 1 – 4: VENDOR AGREEMENT AND COMPLIANCE**

- Any requested exceptions to items in this section which are NON-mandatory must be declared below or as an attachment to this page. Vendor must clearly explain the requested exception and should label the request to reference the specific solicitation item number to which the exception applies.
- Exceptions to Requirements shall cause the vendor's proposal to be disqualified.

By signature below, vendor agrees to and shall fully comply with all Requirements as shown in this section of the bid solicitation.

Authorized Signature

Printed/Typed Name:



Date: May 8, 2024

#### State of Arkansas DEPARTMENT OF HUMAN SERVICES 700 South Main Street P.O. Box 1437 / Slot W345 Little Rock, AR 72203

#### ADDENDUM 1

TO: All Addressed Vendors FROM: Office of Procurement DATE: April 25, 2024 SUBJECT: 710-24-074 Eligibility Support Services

The following change(s) to the above referenced RFP have been made as designated below:

	Change of specification(s)
Х	Additional specification(s)
	_ Change of bid opening date and time
	Cancellation of bid
X	Other

#### OTHER

- Attachment K Remove and replace with 710-23-074 Attachment K Revised
- Attachment J Remove and replace with 710-23-074 Attachment J Revised

#### ADDITIONAL SPECIFICATION(S)

- Section 4.1 Payment and Invoice Provisions add the following language: This could refer to Attachment C, Page 7 - After satisfactory presentation and review of the monthly status report by the Contractor, the deliverable will be signed off and the invoice can be submitted.
- Or for a shorter version Contractor will invoice for monthly services. <u>710-19-1023</u> Attachment H Invoice Procedures.pdf (arkansas.gov)

The specifications by virtue of this addendum become a permanent addition to the above referenced RFP. Failure to return this signed addendum may result in rejection of your proposal.

If you have any questions, please contact: Karrie Goodnight, DHS.OP.Solicitations@dhs.arkansas.gov (501) 320-

Vendor Signature 5/8/2024 Deloitte Consulting LLP Company

Contract Number		_							
Attachment Number		_							
Action Number	Action Number CONTRACT AND GRANT DISCLOSURE AND CERTIFICATION FORM								
			nay result in a delay in obtaining a co	ontract, lea	ise, purchas	se agreement, or grant award with any Arkansas Sta	te Agency.		
SUBCONTRACTOR: SUBCON	TRACTOR	NAME:							
	_		_				1		
TAXPAYER ID NAME: Deloitte	AXPAYER ID NAME: Deloitte Consulting LLP Goods? Services? & Both?								
YOUR LAST N	OUR LAST N MI.:								
ADDRESS: 400 W. Capitol A	ADDRESS: 400 W. Capitol Avenue, Suite 900								
сіту: Little Rock			STATE:	٩R	ZIP COD	DE: 72201	COUNTRY	: USA	
						A CONTRACT, LEASE, PURCHASE		MENT,	
OR GRANT AWARD WI	TH AN	Y ARK	ANSAS STATE AGENCY	', THE F	OLLOW	ING INFORMATION MUST BE DISCL	OSED:		
			FOR	IND	ΙΥΙΙ	DUALS*			
Indicate below if: you, your spous Member, or State Employee:	se or the	brother, s	sister, parent, or child of you or your	spouse is	a current or	former: member of the General Assembly, Constitu	itional Office	er, State Board or Com	mission
Position Held	Mark (√)		Name of Position of Job Held [senator, representative, name of	For How Long?		What is the person(s) name and how are they related to you? [i.e., Jane Q. Public, spouse, John Q. Public, Jr., child, etc.]			
	Current	Former	board/ commission, data entry, etc.]	From MM/YY	To MM/YY	Person's Name(s)		Relation	
General Assembly									
Constitutional Officer									
State Board or Commission Member									
State Employee									
None of the above appli	es								
			FOR AN E	TIT	гу (	B U S I N E S S ) *			
Officer, State Board or Commission	on Memb	er, State		ister, parer	nt, or child o	rship interest of 10% or greater in the entity: membe of a member of the General Assembly, Constitutional se the management of the entity.			
Position Held	Mar	'k (√)	Name of Position of Job Held	For Ho	w Long?	What is the person(s) name and what is his/her what is his/her position of		ship interest and/or	
Position Held	Current	Former	[senator, representative, name of board/commission, data entry, etc.]	From MM/YY	To MM/YY	Person's Name(s)	Owners Interest		
General Assembly									
Constitutional Officer									
State Board or Commission Member									
State Employee									
None of the above appli	es								-

Contract Number

Attachment Number

Action Number

#### **Contract and Grant Disclosure and Certification Form**

Failure to make any disclosure required by Governor's Executive Order 98-04, or any violation of any rule, regulation, or policy adopted pursuant to that Order, shall be a material breach of the terms of this contract. Any contractor, whether an individual or entity, who fails to make the required disclosure or who violates any rule, regulation, or policy shall be subject to all legal remedies available to the agency.

#### As an additional condition of obtaining, extending, amending, or renewing a contract with a *state agency* I agree as follows:

- 1. Prior to entering into any agreement with any subcontractor, prior or subsequent to the contract date, I will require the subcontractor to complete a **CONTRACT AND GRANT DISCLOSURE AND CERTIFICATION FORM**. Subcontractor shall mean any person or entity with whom I enter an agreement whereby I assign or otherwise delegate to the person or entity, for consideration, all, or any part, of the performance required of me under the terms of my contract with the state agency.
- 2. I will include the following language as a part of any agreement with a subcontractor:

Failure to make any disclosure required by Governor's Executive Order 98-04, or any violation of any rule, regulation, or policy adopted pursuant to that Order, shall be a material breach of the terms of this subcontract. The party who fails to make the required disclosure or who violates any rule, regulation, or policy shall be subject to all legal remedies available to the contractor.

3. No later than ten (10) days after entering into any agreement with a subcontractor, whether prior or subsequent to the contract date, I will mail a copy of the **CONTRACT AND GRANT DISCLOSURE AND CERTIFICATION FORM** completed by the subcontractor and a statement containing the dollar amount of the subcontract to the state agency.

<u>I certify under penalty of perjury, to the best of my knowledge and belief, all of the above information is true and correct and that I agree to the subcontractor disclosure conditions stated herein.</u>					
Signature		i	tle Managing Director	Date <sup>May 8, 2024</sup>	
Vendor C		į	tle Managing Director	Phone No.	
<u>Agency use only</u> Agency Number_ <sup>0710</sup>	Agency Name Department of Human Services	Agency Contact Person	Contact Phone No.	Contract or Grant No	



Deloitte 30 Rockefeller Plaza New York USA

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#### AFFIRMATIVE ACTION FOR EQUAL EMPLOYMENT OPPORTUNITY – A STATEMENT OF POLICY

Deloitte's success as a professional services organization requires that we maintain a rich diversity of people able to render services with exceptional quality, excellence, and commitment. Our affirmative action policy advances the principles of equal employment opportunity and supports that goal by enlarging our talent pool.

Deloitte's policy is to seek and employ people with skill and integrity and to provide them with the means to develop professionally, without regard to race, color, religion, creed, citizenship, national origin, age, sex, gender, pregnancy, gender identity/expression, sexual orientation, marital status, disability (including neurodiversity), genetic information, veteran status or any other legally protected basis, in accordance with applicable federal, state, or local law. Our policies aim for the highest standards of fairness and equal opportunity, covering all aspects of employment, including, but not limited to, recruitment and employment, promotions, compensation, team opportunities, and training programs. We are committed to compliance with all laws and regulations relating to equal employment opportunity (EEO), affirmative action, and harassment, and to ensuring that all employment decisions are based only on valid job requirements. Our policies provide for an internal audit and reporting system that helps Deloitte monitor and evaluate the effectiveness of its affirmative action efforts and programs.

Employees and applicants must not be subjected to harassment, intimidation, threats, coercion, discrimination or any form of reprisal because they have (1) filed a complaint; (2) assisted or participated in an investigation, proceeding, or any other activity related to the administration of any federal, state, or local law requiring EEO; (3) engaged in any activity that is protected by Deloitte policy; (4) opposed any act or practice made unlawful by any federal, state, or local law requiring about, discussed, or disclosed their own pay or the pay of another employee or applicant; or (6) engaged in any other activity that is protected by any federal, state, or local law.

To support our inclusive culture, Kwasi Mitchell, Chief Purpose and Diversity, Equity, and Inclusion (DEI) Officer, oversees the vision and the implementation of our Inclusion strategy. Overall direction and support on our affirmative action program is provided at the national level through Talent ELE Compliance. They are responsible for monitoring compliance with federal affirmative action regulations across Deloitte.

#### Invitation to Self-Identify

Employees may choose to voluntarily disclose their sex, race, ethnicity, protected veteran status and disability at any time via Deloitte's self-service portal. Applicants may self-identify during the application process. Employees and applicants with disabilities are encouraged to inform Talent Relations if they need a reasonable accommodation to perform a job for which they are otherwise qualified.

#### Affirmative Action Plans

The Office of Federal Contract Compliance Programs (OFFCP) requires that Deloitte prepare affirmative action plans and update them annually. Deloitte's plans incorporate the policies referenced herein and also specify the actions to be taken if the policies are not adhered to. Employees may request access to these plans by contacting Talent ELE Compliance.

hann M. Siyadar

Jason Girzadas, Chief Executive Officer

#### About Deloitte

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee ("DTTL"), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as "Deloitte Global") does not provide services to clients. In the United States, Deloitte refers to one or more of the US member firms of DTTL, their related entities that operate using the "Deloitte" name in the United States and their respective affiliates. Certain services may not be available to attest clients under the rules and regulations of public accounting. Please see www.deloitte.com/about to learn more about our global network of member firms.

## PROPOSED SUBCONTRACTORS FORM

Do not include additional information relating to subcontractors on this form or as an attachment to this form.

PROSPECTIVE CONTRACTOR PROPOSES TO USE THE FOLLOWING SUBCONTRACTOR(S) TO PROVIDE SERVICES.

Type or print the following information





#### CERTIFICATION FOR BOYCOTT AND ILLEGAL IMMIGRANT RESTRICTIONS

Pursuant to Arkansas law, a vendor must submit the below certifications prior to entering into a contract with a public entity for an amount as designated by the applicable laws.

- 1. Israel Boycott Restriction: For contracts valued at \$1,000 or greater. A public entity shall not enter into a contract with a company unless the contract includes a written certification that the person or company is not currently engaged in a boycott of Israel. If at any time after signing this certification the contractor decides to engage in a boycott of Israel, the contractor must notify the contracting public entity in writing. See Arkansas Code Annotated § 25-1-503.
- Illegal Immigrant Restriction: For contracts exceeding \$25,000.

No state agency may enter into or renew a public contract for services with a contractor who employs or contracts with an illegal immigrant. A contractor shall certify that it does not employ, or contract with, illegal immigrants.

See Arkansas Code Annotated § 19-11-105.

3. Energy, Fossil Fuel, Firearms, and Ammunition Industries Boycott Restriction:

For contracts valued at, or exceeding, \$75,000.

A public entity shall not enter into a contract with a company unless the contract includes a written certification that the person or company is not currently engaged in, and agrees for the duration of the contract not to engage in, a boycott of an Energy, Fossil Fuel, Firearms, or Ammunition Industry. If a company does boycott any of these industries, see Arkansas Code Annotated § 25-1-1102.

By signing this form, the contractor agrees and certifies that it does not, and shall not for the remaining aggregate term of the contract, participate in the activities checked below:



Do not boycott Israel.

Do not employ illegal immigrants.

Do not boycott Energy, Fossil Fuel, Firearms, or Ammunition Industries.

Contract Number & Description	710-23-074 Eligibility Support Services		
Name of Public Entity	Dept. of Human Services, Division of County Operations		
Name of Vendor/Contractor	Deloitte Consulting LLP		
AASIS Vendor Number	100182053		
	5/0/0004		

5/8/2024

Date

Contractor Signature

#### INFORMATION FOR EVALUATION

- Provide a response to each item/question in this section. Prospective Contractor may expand the space under each item/question to provide a complete response.
- Do not include additional information if not pertinent to the itemized request.

 Section E.1 Technical Approach and Solution

 A.
 Provide a timeline and milestones for meeting requirements outlined in the solicitation.

5 points

# Technical Approach and Solution

## Securing Business Continuity: Deloitte as Your Trusted Collaborator for Eligibility Support Services

The Arkansas Department of Human Services (DHS) requires an advisor with the ability to provide 100 to 350 trained Full Time Equivalents (FTEs), deliver high quality and timely service to the DHS Division of County Operations (DCO) and Arkansas residents, and identify opportunities for enhancement and automation.



also be able to hire, train, and operate an effective team providing eligibility support services.





The RFP details the timeline of key activities including hiring, onboarding, training, and reporting, allowing Deloitte to establish a project timeline aligned to DHS requirements.









## **Deloitte Difference**

We have followed the requirements published in the RFP and have proposed timelines based on these requirements.



Section E.1 Technical Approach and Solution

B. Provide a detailed description of how the Prospective Contractor will implement services when the contract is signed. 5 points

## A Path to Success: Implementing Eligibility Support Services



detailed steps to implement eligibility support services.

## Project Kickoff & Reporting





## **Training & System Access**

DHS requires a vendor that can deliver a workforce skilled in processing Medicaid cases.



## **Case Processing**



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Section E.1 Technical Approach and Solution

C. Provide a list and description of reports provided in a previous project of similar size and scope such as staffing level 5 points reports, quality control reports, case and task processing, productivity monitoring and status reports.

## Reporting







Section E.1 Technical Approach and Solution

E. Provide a detailed training plan including the amount of time for a new worker to be fully trained, maximum number 5 points of students per class, list of classes each person will take, passing scores, number of attempts to pass, how new policies and procedures will be trained, and approach to training new workers.

## **Training Plan**

To incorporate a smooth transfer of knowledge,



### **Eligibility Specialists Training Approach**



## **Training Schedule**





Section E.1 Technical Approach and Solution

F. Provide a quality improvement plan that describes the Prospective Contractor's approach to quality assurance to 5 points meet 95% accuracy including quality control processes for monitoring the quality of performance, communicating deficiencies, and obtaining feedback



The following figure illustrates our quality control process.



Eligibility specialists are expected to exceed a 95 percent quality assurance score;







# Background, Experience, and Qualifications

Section E.2 Background, Experience and Qualifications A. Complete Attachment Client History Form (Question #1) 5 points Client History Form (Question #1) Deloitte's Client History Form is attached separately. Section E.2 Background, Experience and Qualifications Provide resumes for all proposed key personnel which shall include relevant projects (past and current) that each B. individual has supported for state human service programs such as Medicaid, CHIP, SNAP, and TANF. Resumes shall not exceed four (4) pages and must demonstrate past eligibility support services work on at least one (1) eligibility system that supported multiple benefit programs. Resumes shall include the following information: 1. Client organization names. Time periods worked.
 Role of the proposed individual within each project. 5 points 4. Brief summary of the project scope. 5. Names, positions, and current telephone numbers of persons who can provide information on the proposed individuals' performance on at least two (2) projects. Years of experience working with eligibility systems for state human services programs. 6. Formal education including degrees completed (Note: Formal education will not be substituted for experience). 7. 8. Any technical certifications relevant to this project.

## Delivering an Experienced Team on Day 1: Meet your Surge Support Leaders

Our cross-functional core team brings the required experience, skills, knowledge, and familiarity to collaborate with you and deliver effective results.

To support the key team members described below,

Deloitte's team has experience in Health and Human Services, including the following:

## **Key Personnel**

Deloitte delivers key personnel who have built relationships



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Arkansas DHS Solicitation 710-23-074 Eligibility Support Services







Section E.2 Background, Experience and Qualifications

C. Complete Attachment I Client History Form (Question #2)

5 points

### **Client History Form (Question #2)**

Deloitte's Client History Form is attached separately.

# Project Management, Organization, and Staffing Section E.3

Sec	tion E.3 Project Management, Organization and Staffing	
A.	Provide an organizational chart that displays the overall business structure including proposed personnel job titles and lines of supervision	5 points
B.	<ul><li>Describe the approach to project management and project control methods including the following:</li><li>How the contract will be managed</li><li>How contract activities will be controlled</li></ul>	5 points 5 points
C.	<ol> <li>Describe the approach to project staffing:</li> <li>The screening and selection process for meeting staffing requirements</li> <li>Staff management and support to ensure high retention rates</li> </ol>	5 points 5 points
D.	Provide a staffing continuity plan that allows for staffing need changes throughout the contract, including the ability to scale up or down quickly	5 points

### Driving Medicaid Excellence in Arkansas: Deloitte's Approach to Project Management and Service Delivery

Deloitte seeks to support the State of Arkansas with its request for Medicaid Eligibility Support Services.







Based on the Organization Chart above, the Eligibility Support Services team has various roles and responsibilities, as detailed in the table that follows.



Section E.3 Project Management, Organization and Staffing

B. Describe the approach to project management and project control methods including the following:

- 1. How the contract will be managed
- 2. How contract activities will be controlled

### **Approach to Project Management and Control Methods**

Eligibility Support project management encompasses all Eligibility Support Services activities and operations within the scope of the contract. Our team's project management and controls





Section E.3 Project Management, Organization and Staffing

- C. Describe the approach to project staffing:
  - 1. The screening and selection process for meeting staffing requirements
  - 2. Staff management and support to ensure high retention rates.

### **Approach to Staffing**

Deloitte's approach to project staffing is based

Screening and Selection Process





### Staff Management and Support to Ensure High Retention Rates



### **Our Shared Values**



### Learning and Development as a Journey

Section E.3 Project Management, Organization and Staffing

D. Provide a staffing continuity plan that allows for staffing need changes throughout the contract, including the ability to scale up or down quickly

### **Staffing Continuity Plan**

We understand that the variables, such as a Stateforecasted need and/or budget allotments, can change, resulting in the need to ramp down quickly.



# In Conclusion





Attachment I Client History Form RFP # 710-23-074

### **Client History Form**

<u>Instructions:</u> This form is intended to help the State gain a full understanding of each Respondent's background and experience in eligibility determinations for Medicaid. This form must be accurately completed and signed by the same signatory who signed the Proposal Signature Page (please see final page below).

The State reserves the right to verify the accuracy of responses by contacting any of the listed clients; therefore, all applicable clients must be listed. For purposes of this form, the "client" is not an individual, but the entity which held the contract. By way of explanation, in the Contract resulting from this RFP, Arkansas's DHS will be the client. For each listed client, Respondents must include the client entity's name, address, and phone number. Additionally, Respondents are encouraged to provide an individual's contact information for a person at the client entity who is knowledgeable of the named project. If the State contacts the clients listed, the State reserves the right to either contact the listed individual and/or another person at the client entity. Omission of a relevant client will constitute a failure of form completion.

The boxes below each prompt will expand if necessary. If there are no contracts which meet the definition, Respondent must state "none."

1. Provide a company background summary including the date established, location, type of ownership, and the total number of employees that provide eligibility support services.

### **Our Background**

**Date Established.** Deloitte Consulting LLP (est. 1994 and henceforth referred to as Deloitte) is a privately held entity and a subsidiary of Deloitte LLP.

Location. 30 Rockefeller Plaza, 41st Floor, NY, 10112-0015.

**Ownership.** Deloitte Consulting is a Limited Liability Partnership (LLP).

**Total Number of Employees.** For fiscal year 2023, Deloitte's U.S. headcount was approximately 171,000, of which 22,000 are in our Government & Public Services (GPS) practice.

**Organizational chart with the overall business structure.** With over 171,000 professionals nationwide, Deloitte is the largest private professional services provider in the United States (U.S.). We provide professional services in consulting, audit, tax, and advisory businesses within a single organization. Within consulting, we organize our capabilities around two dimensions: industry and offering portfolio. The following figure depicts the high-level structure of the Deloitte U.S. Firm.



We serve State Government clients as part of our Government and Public Services (GPS) practice, which has seven offering portfolios (see the figure above). This breadth of disciplines and services allows us to draw across functions, developing and implementing innovative solutions for the clients we serve. The highlighted green boxes in the figure illustrate the areas of our organization relevant to services provided to Arkansas DHS.

### **Our Experience**

Deloitte's years of experience delivering value to 250+ public sector organizations include partnering with clients at the Federal, State, and Local levels. Our GPS practice serves clients across 49 states and the federal government. Our breadth and depth of experience in providing Consulting and IT services to state agencies in 49 out of the 50 states is unmatched. Our leading human services offering, which includes Medicaid, provides our state clients with unmatched expertise and experience, as shown in the figure that follows.

2. Please list three (3) examples where you served as the **prime contractor** for a project similar in size, complexity, and scope in the past five (5) years for a state government entity. Provide the following for each example: A description of work performed including experience with eligibility determinations for Medicaid applications, renewals, and changes of circumstance, the contract period, contract amount, staff FTE count, names, positions, and client contact information.

### **Client History**

### **Client History Example #1**

Client History Example #1:	
Project Name	Eligibility Support
A description of the work performed	
performed	

### Throughput

The time period of the project or contract

Contract amount

Staff Full Time Employee (FTE) count

**Client contact** 

## Client History Example #2

Client History Example #2:	
Project Name	
A description of the work performed	
performed	

### Throughput

The time period of the project or contract

Contract amount

Staff Full Time Employee (FTE) count

**Client Contact** 

# Client History Example #3

Client History Example #3:         Project Name         A description of the work         performed	
performed	

Throughput
The time period of the project or contract
Contract amount
Staff Full Time Employee (FTE) count
Client contact

Authorized Signature:

Printed/Typed Name:

Title: Managing Director

Date: <u>May 8, 2024</u>