



Business Process Documentation Development Support (VOTE)

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Agenda

Staff will review a recent procurement for a vendor to provide business process document development support and recommend engaging with Zelus Consulting Group (Zelus).

- Business Processes: Current and Future State
- Procurement Process
- Board Vote

Strategic Plan and Equity Orientation re: Business Process Documentation

2024-2028 Strategic Plan Alignment

Business process documentation supports the following of the strategic plan's key pillars:

- Improve and modernize at the applicant and enrollee experience
- Deliver high-value coverage options to residents of the Commonwealth
- Improve equitable access to affordable health insurance coverage
- Maintain and strengthen organizational structure and system reliability

These pillars are advanced by:

- *Creating a comprehensive, agency-wide set of updated Standard Operating Procedures governing the organization's technical, operational, legal, policy, communications, financial, and administrative activities and responsibilities in a centralized library that serves as a living staff resource*

Combating Inequity

Business process documentation supports the centering of equity in the following ways:

Minimizing staff time spent on procedural or administrative tasks, allowing for higher focus on programmatic initiatives to support members, applicants, and the uninsured

- ✓ *Consistent and clear documentation of processes and procedures empowers staff to work efficiently and effectively toward strategic goals related to equity-centered program and policy aims*

Clear internal procedures ensure consistency in the Health Connector's role as an employer

- ✓ *Detailed, accessible documentation provides transparency for staff on what to expect in their roles*



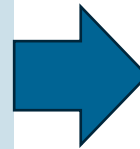
Business Processes: Current and Future State

Current and Future State

As a “mature” ACA Marketplace, the Health Connector seeks to ensure that all operational processes are intricately documented as a touchstone against which to evaluate business improvements going forward.

Current State

- Varying levels of documentation for its full array of business functions
- Documents in different templates and different formats
- No centralized system where all standard operating procedures (SOPs) and workflow documents are stored
- No standard process for regular review, updates, and approval



Future State

- Creation of a good system that produces good results
- Easy visibility into how things are done at all levels
- Clearly defined roles, responsibilities and handoffs
- Documented best practices
- Reduced training time and costs
- Shift from reactive to proactive

Goals of the Procurement

To reach the organization's future state vision, the Health Connector sought a vendor to support staff in completing necessary work:

- Improve how the Health Connector creates, stores, and updates business documentation
- Develop a comprehensive, agency-wide set of updated standard operating procedures
- Highlight and document handoffs in complex, cross-agency processes that have evolved over many years
- Create a centralized library that serves as a living staff resource
- Train staff on the internal processes established to create and store process documentation

Procurement Strategy

The Health Connector posted a Request for Quotes (RFQ) under state blanket contract PRF76 for Management Consultants, Program Coordinators and Planned Services.

- The RFQ was issued on April 24, 2024 seeking a vendor with:
 - Knowledge of the Affordable Care Act
 - Experience working with State-Based Marketplaces
 - Experience successfully standing up an effective set of business processes for a complex public sector entity
 - Ability to recommend best practices for aspects of the Health Connector's work based on experience with other clients or research into industry standards



Business Process Documentation Development Support Procurement

The Scope of the Request for Quotes (RFQ)

The RFQ expressed the Health Connector's preference for a vendor that could support the documentation initiative as well as optional technology solution and configuration services.

- Develop an updated comprehensive and centrally organized set of business documentation that articulates the full range of business responsibilities and functions of the agency
- Create a system for organizing and updating documentation
- Create a searchable, easy-to-reference business process and Standard Operating Procedures database for the agency
- Recommend a solution for ongoing maintenance and upkeep of business infrastructure documentation

Responses

The Health Connector received four responses to the RFQ:

Accelare, Inc.	Certified small business with its founding history in business process re-engineering with headquarters in Randolph, MA
Diversified Systems, Inc.	Award-winning corporation that provides management consulting services nationwide with headquarters in Columbus, OH
Guidehouse, LLP	Leading global provider of consulting services to public and commercial clients with extensive experience in management, technology and risk consulting with headquarters in McLean, VA
Zelus Consulting Group	Woman-owned business that helps clients build strong operational platforms through process, training, and implementation expertise with headquarters in Medford, MA

Evaluation Approach

Staff scored bidder responses to identify a vendor with demonstrated experience in process documentation and supporting similarly complex public-sector organizations.

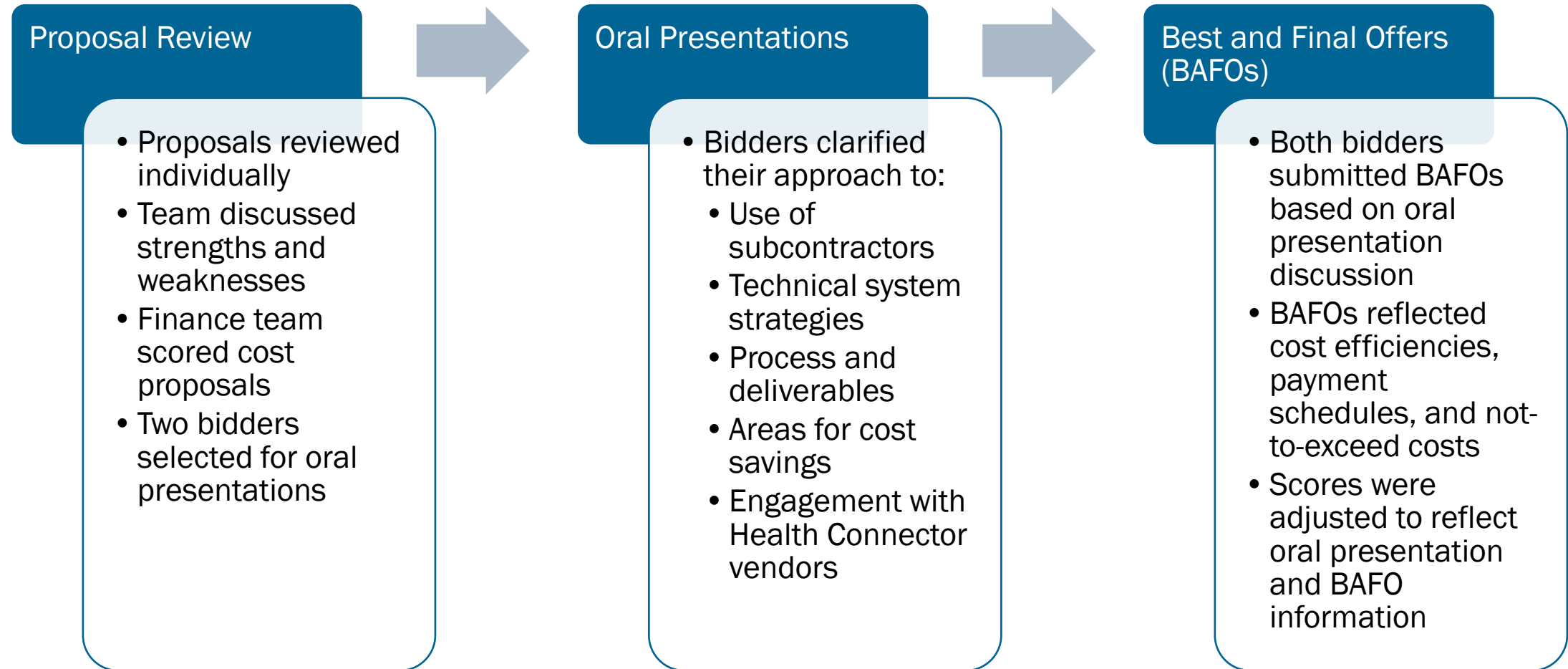
For Overall Value, the evaluation team considered all of the scored line items plus:

- The depth and relevancy of the Bidders' experience
- Any outside knowledge of a Bidder
- Qualifications of the team proposed to support the Health Connector program

Scoring categories:

- Familiarity and experience with State-Based Marketplaces and the Affordable Care Act (10 pts)
- Experience standing up effective business processes and documentation in complex public sector organizations (20 pts)
- Quality of proposal for project deliverables and timelines (20 pts)
- References (10 pts)
- Personnel (10 pts)
- Price/Cost (15 pts)
- Overall Value including qualities not captured by other scoring categories (15 pts)

Evaluation Process



Apparent Successful Bidder

The evaluation team scored Zelus Consulting Group the highest of all Bidders.

- Demonstrated transparency and responsiveness to the Health Connector
- Maintain a respectable track record of being a strong partner for the Health Connector in a previous engagement
- Proven experience completing projects with comparable size, scope and business requirements
- Local, woman-owned business
- Lower overall cost which was reasonable and competitive

Contract and Price Overview

After an initial assessment phase, the vendor will work with all Health Connector teams to complete work needed to document and catalog procedures.

Phase	Deliverable	Fixed Price
1	Prioritization and assessment of SOPs	\$145,000
2 - 4	<ul style="list-style-type: none">▪ Document SOPs▪ Roll-out program for all departments▪ Execute plan▪ Operationalize program to house and manage SOPs▪ Transition to Health Connector	\$1,500,000
TOTAL		\$1,645,000



Board Vote

Vote

Health Connector staff recommend that the Board of Directors authorize the Executive Director to enter into an agreement with Zelus Consulting Group for business process documentation support services through June 30, 2025 in a total amount not to exceed \$1,645,000.

Services

- Creation of prioritization plan
- Assessment of each department's catalogue of SOPs
- Documented SOPs for every procedure used at the Health Connector and referenced in in the prioritization plan and assessment report
- Operationalized program to house and manage SOPs going forward

Service Term

- October 1, 2024 to June 30, 2025
- One, one-year renewal option