

Value Based Insurance Design Targeted Technical Assistance Scope of Work 11-6-2017

SECTION 5 SPECIFICATION OF SERVICES

5.1 EMPLOYER TECHNICAL ASSISTANCE

- A. The CONTRACTOR shall develop and deploy a technical assistance strategy in support of up to 20 Connecticut-based self-insured employers over two cohorts working to: communicate a data-driven case for change, adapt standard implementation plans to fit organizational culture and priorities, leverage external partnerships to execute those plans, and use a simple, comprehensive tool to evaluate progress.
- B. The CONTRACTOR shall lead the recruitment and application process, in close collaboration with the PMO and OSC, to identify up to 20 participating organizations over two cohorts. In support of these efforts, the CONTRACTOR shall:
 - 1) Advise the PMO and OSC on development of a Request for Applications (RFA) which will include minimum requirements for participating in the technical assistance opportunity.
 - 2) Assist the PMO and OSC in sharing the technical assistance opportunity through relevant channels by:
 - i) Developing an internal database of self-insured employer contacts based on previous phases of the VBID initiative;
 - ii) Leveraging established relationships with business groups, chambers, brokers, and health plans to make introductions to key leadership and human resources contacts;
 - iii) Engaging employer members of the VBID Consortium to outreach to colleagues of interest; and
 - iv) Utilizing additional employer engagement strategies, as outlined in section 5.3 below.
 - 3) Provide guidance, as appropriate based on state procurement laws, on the selection of participating organizations.
 - 4) Assess the RFA process for the first cohort of participating organizations and make recommendations to the PMO and OSC to improve the process for the second cohort.
- C. The CONTRACTOR shall work collaboratively with the leadership of each participating organization to undertake the following activities as part of their technical assistance strategy:
 - 1) The CONTRACTOR shall provide the following to each participating organization:
 - i) A library of VBID educational materials with information on core concepts and case studies; and
 - ii) Ongoing updates on the local and national health care markets and emerging VBID plans via a Twitter feed and monthly newsletter.

- 2) The CONTRACTOR shall complete an initial benefits inventory that reviews benefit materials, summary plan documents, employee surveys and routine reports from health plans, wellness vendors, consultants, and other partners in benefits administration.
 - i) The CONTRACTOR shall supplement data collected from the initial benefits inventory by working with employer leadership to document benefits priorities and culture using the VBID Template for Self-Insured Employers.
 - ii) The CONTRACTOR shall develop a Data Dashboard that includes all data collected and benchmarks identified from the initial benefits inventory.
- 3) The CONTRACTOR shall utilize the Data Dashboard to guide the selection of at least three VBID components to include in a VBID benefits plan. The VBID plan shall detail:
 - i) Financial incentives for preventive care, chronic condition management, and/or high value providers, using the SIM VBID Consortium Template as a guide;
 - ii) Appropriate levels of financial incentives, based on existing research and experience with VBID plans;
 - iii) Mechanisms for financial incentives (i.e. reduced premium, HSA contributions, etc.); and
 - iv) Methodology for defining high value services and providers.
- 4) The CONTRACTOR shall provide a customizable communications framework that may include:
 - i) Flyers, pamphlets, and other targeted marketing materials;
 - ii) Email communications that can be adapted throughout the year;
 - iii) Webinars or in-person meeting guides to educate employees about plan options; and
 - iv) Timeline for employee communications.
- 5) The CONTRACTOR shall provide a customizable evaluation plan, including specific, quantifiable measures to assess to success of the plan design. The Evaluation Plan should include:
 - i) Organizational goals such as increasing preventive screenings or reducing Emergency Department use;
 - ii) Specific, quantifiable measures of costs and quality to assess progress toward goals;
 - iii) Source of needed data to calculate measures;
 - iv) Strategy and resources for measure calculation and for establishing baseline; and
 - v) Plan for ensuring employee confidentiality.
- 6) The CONTRACTOR shall provide six one-on-one TA calls to each participating organization to address specific questions or challenges, facilitate conversations with key stakeholders, or to coach staff.
- 7) The CONTRACTOR shall facilitate conversations with health plan and benefits administration partners, as requested, in order to develop and implement VBID strategies.
- 8) The CONTRACTOR shall launch a peer-to-peer learning collaborative for the participating organizations, featuring the expertise of VBID Health, which shall include:
 - i) One initial in-person meeting to introduce participants to the project, provide a VBID overview, and ask participants to commit to goals;

- ii) Three webinars to provide deeper instruction on each of the VBID template components; and
 - iii) One final in-person meeting for employers to share progress, lessons learned, and next steps.
- 9) At the conclusion of each technical assistance cohort, the CONTRACTOR shall compose a final report detailing:
- i) The TA approach that was undertaken to support the participating organizations;
 - ii) Effective strategies employed throughout the design process;
 - iii) Challenges encountered and solutions identified to overcome;
 - iv) Recommendations to employers seeking to implement VBID plans for their employees; and
 - v) Key resources to support VBID design and implementation.

5.2 VBID CONSORTIUM & TEMPLATE SUPPORT

- A. The CONTRACTOR shall undertake activities to support an annual update of the VBID templates with the advice of the SIM VBID Consortium including the following:
- 1) Document local and national legislation relevant to VBID design and implementation;
 - 2) Document local and national VBID trends, news, successes, research, and milestones;
 - 3) Document stakeholder feedback on the Connecticut VBID templates;
 - 4) Document and share VBID research findings via VBID Twitter feed updated weekly;
 - 5) Utilize all relevant information to propose VBID template revisions which may include:
 - i) Revisiting strategies to reduce unnecessary care;
 - ii) Further defining high-value provider networks;
 - iii) Adding consumer stories;
 - iv) Providing evidence of ROI for specific services; and
 - 6) Share revised VBID templates with the SIM VBID Consortium, solicit feedback, and incorporate recommended changes as appropriate.
- B. In support of semi-annual meetings of the SIM VBID Consortium, the CONTRACTOR shall:
- 1) Schedule and facilitate two Consortium meetings (in-person or via webinar) in order to review employer tools and approach for the TA process and to review template changes;
 - 2) Identify meeting objectives in collaboration with the SIM PMO and OSC;
 - 3) Prepare and distribute Consortium meeting materials, including agendas and slide decks;
 - 4) Review meeting strategies and materials with the SIM PMO and OSC and revise as needed;
 - 5) Vet meeting materials with the VBID Consortium Executive team via email;
 - 6) Draft and distribute Consortium meeting summaries; and
 - 7) Follow-up with Consortium members on action items and next steps.

5.3 VBID EMPLOYER ENGAGEMENT ACTIVITIES

A. To promote VBID among Connecticut employers, the CONTRACTOR shall:

- 1) Leverage existing relationships and continue to develop relationships with individual employers, business associations, chambers of commerce, labor unions, and other employer groups, and determine appropriate contacts within each group, such as human resource directors, executive directors, benefits managers, union leaders, and senior management.
- 2) Pitch VBID to identified contacts, as agreed upon by the CONTRACTOR, OHA, and OSC, via email and/or phone to make the case as to why VBID benefits employers and for presenting the concept to their company or group.
- 3) Coordinate with contacts to determine meeting schedules and which meetings are appropriate and convenient for presenting the VBID concept.
- 4) Attend meetings with identified employers, business groups, etc. to pitch VBID to a larger audience, in-person or via phone or webinar.
- 5) Refine short, targeted handouts and visual displays for events and develop persuasive pitches for conversations with individual employers.
- 6) Develop VBID case studies from Consortium members and TA cohort employers to serve as examples for interested employers.
- 7) Support the implementation of an online tool to engage employers around VBID by developing plan recommendations based on specific employer inputs.
- 8) Recommend and support the implementation of innovative approaches to engage employers, such as:
 - i) Establishing awards for employers offering VBID;
 - ii) Endorsing local VBID plans;
 - iii) Coaching employee leaders to request VBID benefits; and
 - iv) Hosting a VBID summit.