
ORAL INTERVIEW SCORING
December 8-11, 2023
RFP # 2334-839
Medicaid 1115 Waiver Policy Consultant

Vendor Names: Transform Health, Milliman, ATI Advisory

Evaluator Number: Enter Evaluator #OE2

General Guidelines:

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- You may discuss the proposals among the evaluation team after the interviews, but each evaluator should score independently. **We do not use consensus scoring.**
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The Oral Evaluation is comprised of two parts: a 15 minute pre-meet check-in with the evaluators and a 45 minute session of Q&A with the evaluators and vendor.

The presentation from the candidate is worth 100 points. Panel Questions will be scored as follows: #1 is worth 10 points, 2 & 3 are each worth 20 points, and 4 & 5 are each worth 25 points.

If you have questions, please direct them to Lauren Bragazzi, Solicitation Coordinator, phone 360-664-6047. All evaluations must be returned and reviewed by the Solicitation Coordinator at the end of the evaluation.

The 5 Oral Evaluation Questions are:

1. Tell us about the team members assigned to this project. Include a recent example where the team members assigned to this project worked together to meet project expectations. (10)

2. Tell us about a time team members had to do a major pivot on a waiver application midstream. How was the pivot handled, and what was the outcome? (20)

3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project? (20)

4. Please explain how you will handle the research and policy analysis element of this project. How would you determine sufficient research and analysis was completed? (25)

5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline. (25)

Oral Evaluator General Notes:

Oral Evaluator Scoring: Transform Health

Question 1. Tell us about the team members assigned to this project. Include a recent example where the team members assigned to this project worked together to meet project expectations.

Comments Mix of policy, politics, on the ground experience; primary team and partners to support; NY State 1115 amendment on health equity; managed whole process, concept paper and draft application, public comment process; negotiation with CMS; STC proposals, protocols to implement on time; prepared to make pivots as needed; federal rule-makers and federal process. Working with the state – embed and make self-available based on what state staff needs; worked with Medicaid director and staff, staff to be lead – additional facilitation support and SME, project management, compile letters and notes, develop early versions of presentations and papers to build on; embed, NYS to join teams account to share docs, passing off info, etc. Had weekly meetings as stand up.

Points Awarded 8 out of 10

Question 2. Tell us about a time team members had to do a major pivot on a waiver application midstream. How was the pivot handled, and what was the outcome?

Comments Renewal, denied by Trump administration, not supportive of previous administration policies; end of that type of investment program; DSRP waivers, didn't have same level of support. Had to develop new strategies – deep dive into the Trump administration priorities; re-align and look at goals alignment; strategies to support and protect state from things the administration was pushing the state to adopt; COVID hit, emergency waiver renewal, Peter Harbiger; pivots; Medicaid managed care authorities in 1115; worked closely with state staff on amendments with pandemic recovery, health disparities; SDOH; landscape assessment, reviewed previous waivers, pilots to fund social services through Medicaid; flexible and research into models, past precedent, first of its kind

Points Awarded 14 out of 20

Question 3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project?

Comments CA to TX transitions; pushed to make stretch goals and make them harder; CA met goals too early; public hospitals to evolve, include clinics, public health, MH and SUD; projects still organization based; NY to have people work together; develop shared project, drive change that is systemic; pivot funding distribution; address pain points from the past; working with a core team, may need to bridge into other agencies within the state, need to identify approval process to weigh in; timelines of when other agencies need approvals or decisions, etc.

Points Awarded ___ 15 ___ out of 20

Question 4. Please explain how you will handle the research and policy analysis element of this project. How would you determine sufficient research and analysis was completed?

Comments

Understand desired model, how it differs from current practice, key informant interviews under direction of the State; look at other states; talk with CMS; understand past precedent; own waiver tracker to drill down; review public comment, STCs, part of supporting decision-making; analyze approaches; discuss and analyze pitfalls to different approaches; limits to past waivers, can also look at other SPAs or types of waivers

Points Awarded _ 15 ___ out of 25

Question 5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline.

Comments Working collaboratively and rolling up sleeves, walking the walk and collectively developing, additional backbone support; join sharepoint; timeline and milestones; strong project management and organization; always have to modify based on CMS conversations; regular check points and moving conversation forward; timeline shifts because of priorities at state or CMS; presidential and state election – monitor how it will impact; understand DC politics; back up plan to work toward similar goals; other mechanisms if changes; how much does it generate

Points Awarded ___ 15 ___ out of 25.

Oral Evaluator Scoring: Milliman, Inc.

Question 1. Tell us about the team members assigned to this project. Include a recent example where the team members assigned to this project worked together to meet project expectations.

Comments Roles for each described, private LTSS, rate setting, policy with states on 1115, actuarial support WA Cares SME, Medicaid LTSS. Subsets of working together, Amanda and Justin Hawaii 1115 waiver, Chris and Jill B. LTSS client projections and cash flow management consultation,

Points Awarded 7 out of 10

Question 2. Tell us about a time team members had to do a major pivot on a waiver application midstream. How was the pivot handled, and what was the outcome?

Comments Waivers require pivot/flexibility; while 30 day public comment period was out, CMS released major policy guidance; would have incorporated if was available, leveraged public comment period – allowed to make changes if based on this; found advocates to discuss new guidance and comments that should be included, able to make those changes; IMD waiver – new component, didn't have enough time; worth asking CMS; first step Is the waiver complete, no significant content review, then negotiate details; all got documented in STCs and operational protocols.

Points Awarded 17 out of 20

Question 3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project?

Comments Several 1st in the nation waivers; Healthy Indiana plan – premiums instead of co-pay for Medicaid; actuaries and states attorneys; Kentucky – member engagement; workforce development; Idaho 1115 and another waiver authority legislators drafted; all share some notable attributes; research and education of CMS partners; technical legal expertise; detail oriented legal research to find the pathway; align with CMS on the why; engage early and often; agree to terms in concept paper; able to be flexible during negotiations; Idaho – driven by state statute which was limited to be flexible in negotiations to tweak program details

Points Awarded ___17___ out of 20

Question 4. Please explain how you will handle the research and policy analysis element of this project. How would you determine sufficient research and analysis was completed?

Comments

Including team members who understand WA Cares; past experience; technical in nature esp on fiscal side; lawyers have technical legal skills to take on complex regulatory research; know you're done when get to an agreement; discretion by Secretary; CMS attorneys could disagree, could be policy driven reasons around precedent setting; iterative, collaborative

Points Awarded ___20___ out of 25

Question 5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline.

Comments Iterative – waiver planning; goals of the waiver; find where approvable pathway is, going through legal info that could be amended; interaction and discussion with CMS; concept paper and get buy-in; anticipate stakeholder feedback prior to public comment; waiver submission phase – draft out STCs for CMS to drive better; parallel reacting to info; In current states with 1115 is a big queue and is backlogged in waiver filing; administration change; expertise from other state waivers

Points Awarded ___22___ out of 25.

Oral Evaluator Scoring: ATI Advisory

Question 1. Tell us about the team members assigned to this project. Include a recent example where the team members assigned to this project worked together to meet project expectations.

Comments Intro for each on project team; currently working with Hawaii demo, same team; senior advisors.

Points Awarded ___7___ out of 10

Question 2. Tell us about a time team members had to do a major pivot on a waiver application midstream. How was the pivot handled, and what was the outcome?

Comments Pivots are to be expected, part of negotiation; CMS technical director former, OMB federal review team; Arizona, DSRP, programs take a lot of time negotiating, expiration was happening and change in administration at the same time; had to get something done very quickly before change to integrate behave and phys, not full extent but given constraints – transformative. Worked through STC, legal counsel, financing in order at state level as part of pivot; need to understand how the state wants it to be

Points Awarded ___18___ out of 20

Question 3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project?

Comments. Tribes, uncompensated care pool to make up for loss of resources; partner with tribes and key stakeholders – governor, congressional members, CMS administrator; details matter to turn into operational implementation plans; need to repeat over and over to digest; how to make this a priority for CMS engagement; evaluations, operational components, finance and baseline for state; budget neutrality; office of general council and OMB reviewers, negotiate internally; dual eligible in past 1115; evolved model and pathways for what the states were trying to achieve; larger policy environment at the time cost containment was priority; seeing policy movement; dementia models and family caregiver support – timing is good; be flexible as a state; avenue is not always the right one – come back with multiple uses of different authorities, ended up using state plan approach

Points Awarded 18 out of 20

Question 4. Please explain how you will handle the research and policy analysis element of this project. How would you determine sufficient research and analysis was completed?

Comments

Goals, research to accurately describe state's initiative for CMS; scope, cost, number of enrollees impacted; data and analytics, research on evaluation process and hypothesis; to support operationalization – understand this will work; entire process is iterative, it's done when we have approval; at risk population to delay or prevent; bring research to bear – being sure it's used in the right way; esp. around private LTSS and role of Medicaid; extend to which would be spending down to Medicaid is very convincing argument

Points Awarded 23 out of 25

Question 5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline.

Comments Need to be flexible, research, consult with stakeholders; deep understanding of requirements and get comments; dynamic cycle to make decisions, document, alter, and talk with CMS and address challenges;

stagnation is true risk, gets stuck in cycle; to be sure we get approval; get into review process as soon as possible; long term care is often missing, want to marry expertise; Medicare implications and bringing front and center to CMS

Points Awarded 23 out of 25

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Oral Evaluator General Notes:

See specific notes under each section for more details but I thought Milliman and ATI were the top contenders. Their presentations were detailed but crisp, to the point and on target which is how I imagine they will interact with CMS. I have concerns that Transform Health might not know the value of being silent sometimes in conversations with CMS.

Milliman brings their knowledge of the current landscape due to their work with WACares already which is valuable. ATI brings a large team with experts in a variety of areas that were not specifically touched on in Milliman's presentation. They also have former CMS staff on the team who can bring their insider knowledge around what CMS might be expecting.

ATI was the only team that mentioned potential cost-savings for duals and to Medicare funding which was interesting. Both ATI and Milliman touched on budget neutrality and Medicaid savings showing they understood the vision of the 1115 proposal.

Milliman provided examples of work they have done with multiple different states on recent 1115 waivers. ATI's example was limited to Arizona from 2016 and Hawaii (currently) so I'm unclear on what other recent engagements they have been involved in.

Oral Evaluator Scoring: Transform Health

81 points

Question 1. Tell us about the team members assigned to this project. Include a recent example where the team members assigned to this project worked together to meet project expectations.

Comments

Key team members included in the interview. 1115 waivers – key component of their work. Background in health care policy, legislature, many 1115s across the nation. SaraBeth – new manager of policy working on waivers at NASHP. Working closely with last 4 NY state waiver requests.

Mary Hunt Moore – key analyst. Former Director of strategic initiatives in Tennessee. Heather Bates – CEO and VP of stakeholder engagement. Lots of background with LTSS – worked on the hill. Policy, politics, on the ground experience.

Have a primary team and an additional back up team as needed.

Most recent example was with NY state waiver amendment focused on health equity and integration of social services. Developed the concept paper, prepared the application, reviewed over 1800 comments from stakeholders. Supported state with negotiations with CMS, proposing STCs and assisting with protocols to ensure the waiver could be implemented. Embedded themselves with the state team and worked closely with the Medicaid director and provide support as needed to the state team ie project management, note-taking, develop early versions of decision papers etc. Weekly standing meetings.

Points Awarded ____10____ out of 10

Question 2. Tell us about a time team members had to do a major pivot on a waiver application midstream. How was the pivot handled, and what was the outcome?

Comments

Demonstrations result in a lot of pivots. 2019 working on delivery system reform removal. Denied by the Trump administration and didn't have the same level of support. Regrouped and did a deep dive into the trump administration policy goals and developed strategies to support and protect the state. COVID hit so took advantage of some of the flexibilities at the federal level. A lot of pivots around covid because some key policies were expiring from their previous 1115 waiver eg managed care policies. Reviewed where the opportunities were – what other flexibilities could be used. Presented these to the state to help state staff make key decisions. How do we address SDOH and help with new policies from CMS. Really get a sense of what CMS may be willing to approve and also closely tracks what else has recently been approved ie complete landscape assessment.

Response really didn't speak much to the outcome of the measures they took.

Points Awarded ____16____ out of 20

Question 3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project?

Comments

First of its kind: DSRIP waivers – early pioneers were California and Texas – CMS wanted more stretch goals from Texas. New York wanted to redesign their delivery system too, CMS wanted them to redesign something completely different. Make it more digestible and work together. What were the mechanisms used in California and Texas – broader inclusion with shared projects, goals and visions. Drive systemic change.

Key Collaborators: Start with a big tent – who is impacted, who will be doing the work, who is being left out? Who does this benefit and what are the gaps? Who are the key players? CMS usually needs more time and have more questions than usual. Is there any past precedent or mechanisms to move the conversation forward. Are there other parts of the state than need to be included.

Lessons Learned: Other states use some of the NW lessons learned. Dig deeper and track projects in their own data base. Where are the pain points when implementing. Is infrastructure needed and do they need to build into the waiver proposal. Learning that things take longer as CMS is rebuilding their agency.

How are they applied: Not answered.

Transform Health staff did not seem to know when to stop talking with this question and made me uncomfortable around time planning knowing that the two most important weighted questions were left with not enough time to answer thoroughly.

Points Awarded __15____out of 20

Question 4. Please explain how you will handle the research and policy analysis element of this project. How would you determine sufficient research and analysis was completed?

Comments

Shared slide decks with more complete detail. What are the key goals and desired outcomes etc -this is done under the direction of the state. Understand the state approval process and signing and included in their work plan.

Conduct research on past precedent – landscape assessments of potential approaches. Talk with CMS to check their receptivity. What have other states requested. They have their own waiver tracker tool.

Review public comments and STCS and evaluation outcomes. What are potential approaches and pitfalls?

Decision support and proposal. Develop the waiver proposal and develop presentations and concept papers etc. Share for feedback and refine as needed.

This answer was a bit rushed as they were running out of time.

Points Awarded 20 out of 25

Question 5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline.

Comments:

Approach for this project – work collaboratively with us. Hone in on what is needed and develop together. Regular meetings and shared timeline with key milestones. Track project closely to ensure they stay on track. Modify approaches based on conversations with CMS. Dedicate project management and track goals. Stay flexible. Looking forward for other potential challenges such as presidential elections etc. Have conversations with folks in DC. Have a back up plan in case the winds change which can be used to get to the same goal. Intrigued by mechanism we are looking for to generate shared savings. Strive to be our partner behind the scenes.

This last question made me question their knowledge around strategies to generate shared savings and to be able to bring innovative solutions to WA.

Points Awarded 20 out of 25.

Oral Evaluator Scoring: Milliman, Inc.

90 points

Question 1. Tell us about the team members assigned to this project. Include a recent example where the team members assigned to this project worked together to meet project expectations.

Comments:

Slidedeck presentation so well prepared. Jill Bruckert will be the policy lead. Amanda: Senior health care consultant and spent most of her career working on 1115 work.

Justin: worked with Milliman for many years working on LTSS programs. Chris: Principal and Consulting Actuary with Milliman. Currently writing support for WACares program and been involved since the beginning. Jill: Principal and Consulting Actuary. Supported Chris on earlier work with WACares program.

How the team has worked together: Unique set of skills with WACares program and experience across nation on policy work and 1115 implementations. Worked in the state of Hawaii to submit an 1115 waiver. 17 years Jill and Chris have worked closely on LTC insurance clients. Work well together as a team.

Points Awarded 10 out of 10

Question 2. Tell us about a time team members had to do a major pivot on a waiver application midstream. How was the pivot handled, and what was the outcome?

Comments:

Example: Change in federal policy guidance in the process of the 30 day comment period. What options did the state have? End comment period and start over? Do amendment? Decided to leverage the public comment period to be able to make the change as changes could be made if they came in from the public. Worked with stakeholders to make additional comments and they were able to be incorporated into the waiver.

Example: Last minute addition from another state agency right as they were finalizing the 1115 work to submit to CMS. Adding this would impact the timeline. Decided it was worth the ask so added a high level framework and work out the details later.

Everything was able to be approved and new work was incorporated.

The team provided great examples and shared the outcomes of the decisions that were made in how to address the need to pivot.

Points Awarded 20 out of 20

Question 3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project?

Comments:

First of its kind waiver: Worked on several first waivers in Indiana, Kentucky and Idaho. Key collaborators: Multi disciplinary team based on the needs of the waiver. In Indiana it was actuaries and legal experts. With Kentucky it was department of workforce development and in Idaho it was the legislature and the Exec team. All were different but all had similar attributes such as strong legal and technical expertise as only certain sections of the SSA are available. Need to find creative pathways, do detailed research. Must align on the policy with CMS and start with the why approach – how does this align with their national Medicaid policy objectives. Engage with CMS early and often – draft a concept paper and agree to terms before you are formally submitting a waiver. Success hinges on ability to be flexible during negotiations – Idaho waiver was ultimately unsuccessful because there was no flexibility in the state statute.

Points Awarded 20 out of 20

Question 4. Please explain how you will handle the research and policy analysis element of this project. How would you determine sufficient research and analysis was completed?

Comments:

Research and policy analysis: Including several members on the team that have worked closely on the WACare project so feel this is a benefit. Deep understanding of the goals and project. Leverage this expertise to find the right pathway and use technical legal skills to take on complex regulatory research.

How to determine if there's enough resource: Waivers are discretionary so there is only enough resource work done when you get to yes with CMS. Implement an iterative process with CMS and work back and forth until done.

This response talked a lot about working with CMS but didn't really speak to working with the state team and how they would work with us to make critical decisions on how to move forward when faced with policy decisions and how to know when our team feels confident that enough analysis has been completed.

Points Awarded 20 out of 25

Question 5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline.

Comments:

Approach: Iterative approach – waiver planning phase with state team and stakeholders to determine the goals of the waiver. Where is the approvable pathway? Waiver design and waiver drafting phase – lots of interaction and discussion with CMS so do the concept paper and get buy-in before submitting the waiver. Don't submit something you don't think CMS will approve. Public comment period – talk with stakeholders some more to ensure you understand their feedback and viewpoints. Lots of this has already been done with their work to date with WACare. Finally, drafting STCs to take workload off CMS and help drive the waiver. Manage to the state's timeline.

Challenges and how to address: It's a new waiver and CMS is backlogged with requests right now. Leverage their existing relationships with CMS to help move this along so that when they are ready to engage, we are ready and have done all our resources. Also, potential administration changeover with a new Secretary so hard to get them to engage. Keep our documentation clear and easy to follow so no surprises or significant issues to address in case of change in admin. Novel waiver – leverage experience they have had working in other states in being flexible.

Points Awarded 20 out of 25.

The Milliman team was well-prepared, provided thoughtful responses and kept within the time frame. Each element of each question was addressed and their approach was clear and concise. They used a 5 slide slidedeck to respond to each question which was very helpful. I felt like they touched on most of the required elements to obtain approval for an 1115 but didn't mention budget neutrality or how they would address this. Based on existing relationship with WACares, they are likely already familiar with potential routes.

Oral Evaluator Scoring: ATI Advisory

90 points

Question 1. Tell us about the team members assigned to this project. Include a recent example where the team members assigned to this project worked together to meet project expectations.

Comments:

Provided slidedeck for this response. Johanna Barraza Cannon – Executive Sponsor, Morgan Craven – Exec. Director.

Currently working together with Hawaii on their 1115 demonstration. Also bringing in a number of senior advisors together to help push the envelope as this is not really Medicaid. Including one of the top advisors in LTC financing and others who are experts in LTC financing, and OMB issues. Combination of policy experts, technical experts, and LTC financing experts

I was impressed they are bringing in financing experts.

Points Awarded 10 out of 10

Question 2. Tell us about a time team members had to do a major pivot on a waiver application midstream. How was the pivot handled, and what was the outcome?

Comments:

Pivots are to be expected and hope they can anticipate what CMS will be answering. They have done this with many states and Johanna worked for CMS as an 1115 Director so she is very familiar with what CMS might need.

Example: state of Arizona 2016, Seeing DSRIP incentive programs being implement in other states. Challenge is they take time and they did not have much time with the ending of their current waiver, and it was also an election year. Their timeline was considerably shortened due to change in administration. They did get their approval to better integrate behavior and physical health initiatives. The work was transformative

Key principles: strong communication with CMS leadership. Make expedited decisions along the way. Be willing to compromise and focus on what would be most beneficial. Needed their SMEs to work closely with CMS SMEs. Support CMS to work with their federal partners. Have financing in place at the state level so they were ready.

Very thorough answer from ATI with clear answers and a good example.

Points Awarded 20 out of 20

Question 3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project?

Comments:

First of its kind waiver: Arizona impacted by the recession and needed to make changes to its Medicaid programs. Wanted to create a new program for tribal providers that would make up for loss of Medicaid funding. Came up with idea of uncompensated care funding for tribes.

Key collaborators: Slide deck indicated complete list of stakeholders including legislators, CMS administrator, the White House, Governor. Collaboration is so important and they had strong support with tribal leaders and helped support them during the process. Also included state SMEs and CMS SMEs

Lessons learned: Details matter. Need a concise vision and value proposition for results of making these changes. More complete information provided on their slide.

How applied: Will apply lessons learned to WA's request. How important the financing piece is and budget neutrality. Office of General Council was a key stakeholder for the financing portion as was the Office of Management and Budget. They can make the case with other federal partners to help move things forward. They took advantage of the larger policy arena at the time and they are starting to see more federal movement around LTC financing. Many people at Congress are interested in this topic so timing is very good for WA right now. Be flexible on what you find out during the process and CMS may come back with other authorities that could be used.

ATI provided details response which hit on all topics I would expect to see, including financing options and budget neutrality.

Points Awarded 20 out of 20

Question 4. Please explain how you will handle the research and policy analysis element of this project. How would you determine sufficient research and analysis was completed?

Comments:

Research and policy analysis: Why does it align with CMS, help them understand our goals. Need data on scope, cost, # of impacted Medicaid enrollees. There is a lot of research that has already been done and aware that WACares could help delay entry to Medicaid – divert and delay to save dollars. Want to ensure our argument is convincing to CMS.

When is it complete: Iterative process – it's done when we have approval from CMS. Research will happen throughout the engagement.

Interesting response since WACares is not focused on Medicaid enrollees. Slide could have been targeted towards this specific population who are not eligible for Medicaid. Answer did not focus much on the policy analysis and how they would work with state staff on making key policy decisions. I did appreciate they understand the potential cost savings to Medicaid if this is approved.

Points Awarded ____15____ out of 25

Question 5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline.

Comments:

Approach: Need to be flexible with the negotiations. Can provide support to draft and submit the proposal, consult with stakeholders, complete public comments etc.

Understand when to submit and sometimes it is very dynamic and works in cycles.

Challenges: Risk of denials but true risk is stagnation and getting trapped in an iteration cycle.

How to address: Need to get on a regular cadence with CMS and meet frequently – important to identify people at CMS that can champion the work.

Strategies to meet timeline: Proposal laid out by ATI is 9 months. Can use white papers and concept papers to help feel out CMS. Need a lot of work and buyin on the state side too. Need to get to consensus within the state. Meet with stakeholders and be available to answer questions about the proposal. Ensure comments are reflected in the proposal going to CMS. Propose to use a very thorough approach and balance this with a team that is very creative and can test ideas. Bring in the LTC financing expertise.

There are medicare implications as well so is the state aware of this when thinking about potential cost savings etc. Excited to engage federal partners in this discussion and are optimistic about this approach with duals. 1115 was created so that states could be innovative and excited to work on this proposal. Must bring a complete story to CMS and they have a close working relationship with Milliman already.

Points Awarded ____25____ out of 25

Has some questions about how this would work with HCA and data analytics and actuarial analysis.

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3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project? (20)
4. Please explain how you will handle the research and policy analysis element of this project. How would you determine sufficient research and analysis was completed? (25)
5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline. (25)

Oral Evaluator General Notes:

Average is half of available points (rounded up to the nearest whole point)

Oral Evaluator Scoring: Transform Health

Question 1. Tell us about the team members assigned to this project. Include a recent example where the team members assigned to this project worked together to meet project expectations.

No comments

Points Awarded 7 out of 10

Question 2. Tell us about a time team members had to do a major pivot on a waiver application midstream. How was the pivot handled, and what was the outcome?

Comment: it seemed this was a waiver renewal rather than application.

Points Awarded 8 out of 20

Question 3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project?

Comment: it was unclear what involvement bidder had with state in negotiation a novel waiver.

Points Awarded ____12____ out of 20

Question 4. Please explain how you will handle the research and policy analysis element of this project. How would you determine sufficient research and analysis was completed?

Comment: answered seemed to lack knowledge of enabling statute for this demonstration project

Points Awarded ____11____ out of 25

Question 5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline.

Comment: No mention of the program taking on this demonstration (WA Cares) or the savings idea asked for in the enabling statute.

Points Awarded ____9____ out of 25.

Oral Evaluator Scoring: Milliman, Inc.

Question 1. Tell us about the team members assigned to this project. Include a recent example where the team members assigned to this project worked together to meet project expectations.

No comments

Points Awarded ____9____ out of 10

Question 2. Tell us about a time team members had to do a major pivot on a waiver application midstream. How was the pivot handled, and what was the outcome?

No comments

Points Awarded ____14____ out of 20

Question 3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project?

Comment: strong answer to call of the question, and excellent general explanation.

Points Awarded ____17____ out of 20

Question 4. Please explain how you will handle the research and policy analysis element of this project. How would you determine sufficient research and analysis was completed?

Comment: appreciated the “why” to the answer.

Points Awarded ____21____ out of 25

Question 5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline.

No comments

Points Awarded ____18____ out of 25.

Oral Evaluator Scoring: ATI Advisory

Question 1. Tell us about the team members assigned to this project. Include a recent example where the team members assigned to this project worked together to meet project expectations.

Comment: on point, succinct.

Points Awarded 8 out of 10

Question 2. Tell us about a time team members had to do a major pivot on a waiver application midstream. How was the pivot handled, and what was the outcome?

Comment: easy to follow – general to technical details

Points Awarded 18 out of 20

Question 3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project?

Comment: appreciate explanation of political climate in 1115 negotiations

Points Awarded 18 out of 20

Question 4. Please explain how you will handle the research and policy analysis element of this project. How would you determine sufficient research and analysis was completed?

No comments

Points Awarded 20 out of 25

Question 5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline.

No comments

Points Awarded 23 out of 25

ORAL INTERVIEW SCORING
December 8-11, 2023
RFP # 2334-839
Medicaid 1115 Waiver Policy Consultant

Vendor Names: Transform Health, Milliman, ATI Advisory

Evaluator Number: OE1

General Guidelines:

- Please score each vendor's response without reference to the scores for other vendors. Each score should reflect your score only based on the Vendor's response in each competency area.
- Please note all scores and comments in the allotted sections. If you change a score, initial the change.
- Please include comments that will assist the vendor in understanding why the response did not get full points. Positive comments are also welcome.
- You may discuss the proposals among the evaluation team after the interviews, but each evaluator should score independently. **We do not use consensus scoring.**
- Do not downgrade a proposal because it did not address something outside of the competency areas being judged.

The Oral Evaluation is comprised of two parts: a 15 minute pre-meet check-in with the evaluators and a 45 minute session of Q&A with the evaluators and vendor.

The presentation from the candidate is worth 100 points. Panel Questions will be scored as follows: #1 is worth 10 points, 2 & 3 are each worth 20 points, and 4 & 5 are each worth 25 points.

If you have questions, please direct them to Lauren Bragazzi, Solicitation Coordinator, phone 360-664-6047. All evaluations must be returned and reviewed by the Solicitation Coordinator at the end of the evaluation.

Oral Evaluator Scoring: Transform Health

Question 1. Tell us about the team members assigned to this project. Include a recent example where the team members assigned to this project worked together to meet project expectations.

Comments

Points Awarded 5 out of 10

Question 2. Tell us about a time team members had to do a major pivot on a waiver application midstream. How was the pivot handled, and what was the outcome?

Comments

Points Awarded 7 out of 20

Question 3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project?

Comments

Points Awarded 5 out of 20

Question 4. Please explain how you will handle the research and policy analysis element of this project. How would you determine sufficient research and analysis was completed?

Comments

Points Awarded 5 out of 25

Question 5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline.

Comments

Points Awarded 5 out of 25.

Oral Evaluator Scoring: Milliman, Inc.

Question 1. Tell us about the team members assigned to this project. Include a recent example where the team members assigned to this project worked together to meet project expectations.

Comments

Points Awarded 5 out of 10

Question 2. Tell us about a time team members had to do a major pivot on a waiver application midstream. How was the pivot handled, and what was the outcome?

Comments

Points Awarded 10 out of 20

Question 3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project?

Comments

Points Awarded 15 out of 20

Question 4. Please explain how you will handle the research and policy analysis element of this project. How would you determine sufficient research and analysis was completed?

Comments

Points Awarded 23 out of 25

Question 5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline.

Comments

Points Awarded 20 out of 25.

Oral Evaluator Scoring: ATI Advisory

Question 1. Tell us about the team members assigned to this project. Include a recent example where the team members assigned to this project worked together to meet project expectations.

Comments

Points Awarded 8 out of 10

Question 2. Tell us about a time team members had to do a major pivot on a waiver application midstream. How was the pivot handled, and what was the outcome?

Comments

Points Awarded 15 out of 20

Question 3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project?

Comments

Points Awarded 18 out of 20

Question 4. Please explain how you will handle the research and policy analysis element of this project. How would you determine sufficient research and analysis was completed?

Comments

Points Awarded 20 out of 25

Question 5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline.

Comments

Points Awarded 23 out of 25

ORAL INTERVIEW SCORING
December 8-11, 2023
RFP # 2334-839
Medicaid 1115 Waiver Policy Consultant

Vendor Names: Transform Health, Milliman, ATI Advisory

Evaluator Number: Enter Evaluator #

General Guidelines:

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The presentation from the candidate is worth 100 points. Panel Questions will be scored as follows: #1 is worth 10 points, 2 & 3 are each worth 20 points, and 4 & 5 are each worth 25 points.

If you have questions, please direct them to Lauren Bragazzi, Solicitation Coordinator, phone 360-664-6047. All evaluations must be returned and reviewed by the Solicitation Coordinator at the end of the evaluation.

The 5 Oral Evaluation Questions are:

1. Tell us about the team members assigned to this project. Include a recent example where the team members assigned to this project worked together to meet project expectations. (10)
2. Tell us about a time team members had to do a major pivot on a waiver application midstream. How was the pivot handled, and what was the outcome? (20)
3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project? (20)
4. Please explain how you will handle the research and policy analysis element of this project. How would you determine sufficient research and analysis was completed? (25)
5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline. (25)

Oral Evaluator General Notes:

Oral Evaluator Scoring: Transform Health

Question 1. Tell us about the team members assigned to this project. Include a recent example where the team members assigned to this project worked together to meet project expectations.

Comments

Woman owned minority owned business. Health care policy CEO background. CA legislature. NASHP, deep history in 1115 waivers, New York and CA, LTSS background, Families USA- mix of policy, politics, on the ground and implementation backgrounds.
Strong support team outside of core team.
Manage whole process – including project, comments, draft waiver, negotiations, reviewed comments and incorporate feedback, after submission was involved in negotiations and STCs and protocols.
Inherently political both at state and federal level.
Partnership at the state level – embed and work with staff – staff will be the lead, help facilitate, develop early versions of presentations and prepped materials.

Points Awarded 9 out of 10

Question 2. Tell us about a time team members had to do a major pivot on a waiver application midstream. How was the pivot handled, and what was the outcome?

Comments

NY project, change of administration, did not support previous administration. Had to pivot with the state, to prep had to do a deep dive into the administration priorities and align – needed to support and protect the state. Then COVID happened and had to shift again, used new flexibilities.
Showed slides about the evolution of 1115, lots of pivots, discussion with CMS highlight what they might approve and what has been approved.
Displayed strong understanding of the moving parts around 1115 and deep knowledge of process and dynamics with federal administration and state priorities.

Points Awarded 17 out of 20

Question 3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project?

Comments:

Evolution of 1115 waivers slide again. Learning of CMS approach over time and the learning of CMS over time about how to use these waivers. Long history lesson.

Key collaborators: who is impacted, who is doing the work who is left out. Who is delivering the service

Something new – will need more time as CMS will have more questions, look for past precedent, use as a mechanism to move the conversation forward. If impact is to multiple agencies it takes more time...there has been a lot of turn over during the trump admin and things are taking longer.

Early identification of key decision makers and processes at the state level, where will the barriers be.

Points Awarded _____18_____ out of 20

Question 4. Please explain how you will handle the research and policy analysis element of this project. How would you determine sufficient research and analysis was completed?

Comments

Coordinate with the state on research, study relationships across agencies and understand dynamics.

Spend time to understand desired model, talk to CMS early, look at other states, any precedence. Look at any evaluations done and STCs to support state decision making. If no precedence look to other pilots, look at pros and cons

Points Awarded _____22_____ out of 25

Question 5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline.

Comments

project management support, collaboration, regular check ins and to ensure alignment – sometimes timelines shift at CMS and State, our job is to remain flexible and help out contractor meet its goal. Need to monitor elections and how that will impact our negotiations. Want to talk through

what options there are outside of an 1115 if we don't reach our goal in this way.

Didn't show a strong understanding of a shared savings model- said want to learn more.

Points Awarded 21 out of 25.

Oral Evaluator Scoring: Milliman, Inc.

Question 1. Tell us about the team members assigned to this project. Include a recent example where the team members assigned to this project worked together to meet project expectations.

Comments

strong policy background in WA and have been working on WA in Medicaid and WA CARES space so understand the WA specific information. Didn't discuss partnership with the state.

Points Awarded 8 out of 10

Question 2. Tell us about a time team members had to do a major pivot on a waiver application midstream. How was the pivot handled, and what was the outcome?

Comments

Generally waivers require flexibility. CMS released major policy guidance in the middle of the public comment period- provided specific example of partnership with the state, strategically utilized advocates to incorporate the change as part of public comment. Provided 2nd specific example.

Points Awarded 15 out of 20

Question 3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project?

Comments

Indiana – first in the nation 1115, key collaborators were actuaries and state attorneys

Kentucky – 1115 member engagement, workforce development, agencies in state that hadn't worked together.

Need legal understanding, understand where administration is focused, develop the why, early engagement, be flexible.

Points Awarded ____16____ out of 20

Question 4. Please explain how you will handle the research and policy analysis element of this project. How would you determine sufficient research and analysis was completed?

Comments

Starting with a strong understanding of the WA CARES program.

Strong legal background to take on legal analysis

Done when you get to an agreement,

Points Awarded ____18____ out of 25

Question 5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline.

Comments

5 phases of development.

Linch pin of meeting timeline is CMS engagement, especially going into 2024

Leverage relationships at CMS, well prepared when they are ready to leverage CMS time

Presidential election can drive timeline.

This is a novel waiver, use knowledge and experience from other states

Points Awarded ____19____ out of 25.

Oral Evaluator Scoring: ATI Advisory

Question 1. Tell us about the team members assigned to this project. Include a recent example where the team members assigned to this project worked together to meet project expectations.

Comments

Currently working with HI on a 1115. Not strictly Medicaid not LTSS. Deep 1115 knowledge and financing knowledge.

Points Awarded 9 out of 10

Question 2. Tell us about a time team members had to do a major pivot on a waiver application midstream. How was the pivot handled, and what was the outcome?

Comments

align with Medicaid goals. Pivots will occur, will anticipate questions. Pivots at CMS and state level. DSRIP look at what is happening across the nation, take a long time. admin change resulting in quick timeline, get what they could. understanding on the relationships and the critical things the state needs to have in order to move forward.

Learn where the state is willing to negotiate

Points Awarded 18 out of 20

Question 3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project?

Comments

Communication strategies – engage the right people

Details matter

Identify and elevate champions for state

Develop concise vision – need strong talking points, need to make it a priority.

Need to be strategic

Points Awarded _____18_____out of 20

Question 4. Please explain how you will handle the research and policy analysis element of this project. How would you determine sufficient research and analysis was completed?

Comments

Iterative and when it is done it is done, not sure until we get there.

Robust body of research in existence, feed into the work you have been doing, population spending down to Medicaid. Use the research appropriately and answer all question we may get, who is the population.

Points Awarded ___24_____out of 25

Question 5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline.

Comments

dynamic cycle, get decisions, draft, make adjustments, document

denial isn't the risk, stagnation is – don't get trapped in an iteration cycle.

Points Awarded _____24_____out of 25

ORAL INTERVIEW SCORING
December 8-11, 2023
RFP # 2334-839
Medicaid 1115 Waiver Policy Consultant

Vendor Names: Transform Health, Milliman, ATI Advisory

Evaluator Number: OE4

General Guidelines:

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- Do not downgrade a proposal because it did not address something outside of the competency areas being judged.

The Oral Evaluation is comprised of two parts: a 15 minute pre-meet check-in with the evaluators and a 45 minute session of Q&A with the evaluators and vendor.

The presentation from the candidate is worth 100 points. Panel Questions will be scored as follows: #1 is worth 10 points, 2 & 3 are each worth 20 points, and 4 & 5 are each worth 25 points.

If you have questions, please direct them to Lauren Bragazzi, Solicitation Coordinator, phone 360-664-6047. All evaluations must be returned and reviewed by the Solicitation Coordinator at the end of the evaluation.

The 5 Oral Evaluation Questions are:

1. Tell us about the team members assigned to this project. Include a recent example where the team members assigned to this project worked together to meet project expectations. (10)
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3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project? (20)
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5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline. (25)

Oral Evaluator General Notes:

ATI was by far the strongest presenter.

Oral Evaluator Scoring: Transform Health

Question 1. Tell us about the team members assigned to this project. Include a recent example where the team members assigned to this project worked together to meet project expectations.

Comments

Solid response. Experience managing the whole process, from drafting to negotiation to protocol drafting. "First pen" on documents. Weekly standing meeting at height of engagement

Points Awarded 8 out of 10

Question 2. Tell us about a time team members had to do a major pivot on a waiver application midstream. How was the pivot handled, and what was the outcome?

Comments

NY example; impacting by end of DSRIP waiver funding under prior administration. New waiver was submitted aligned to new administration authorities; Research into models and options.

Points Awarded 16 out of 20

Question 3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project?

Comments

CA/TX/NY experience. Maintain a waiver “database”; Big tent approach; connect to past precedents; time management challenges

Points Awarded 13 out of 20

Question 4. Please explain how you will handle the research and policy analysis element of this project. How would you determine sufficient research and analysis was completed?

Comments

Described a larger-scale, more abstract methodology. Pivot to other approaches if no waiver precedent.

Points Awarded 15 out of 25

Question 5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline.

Comments

Prior responses emphasized collaboration and willingness to take “first pen.” Regular check points; develop alternative strategies if political winds change.

Points Awarded 15 out of 25.

Oral Evaluator Scoring: Milliman, Inc.

Question 1. Tell us about the team members assigned to this project. Include a recent example where the team members assigned to this project worked together to meet project expectations.

Comments

Short answer; Hawaii submission; not much detail on how team would work together.

Points Awarded 6 out of 10

Question 2. Tell us about a time team members had to do a major pivot on a waiver application midstream. How was the pivot handled, and what was the outcome?

Comments

Waivers require flexibility; no detail re substantive pivot associated with complex interactions with CMS.

Points Awarded 12 out of 20

Question 3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project?

Comments

Experience with waivers imposing premiums and work requirements in Medicaid programs (Indiana/Kentucky). Requires additional research to ID appropriate pathway; important to align on the policy with CMS; develop position papers; be flexible in negotiating with CMS

Points Awarded 14 out of 20

Question 4. Please explain how you will handle the research and policy analysis element of this project. How would you determine sufficient research and analysis was completed?

Comments

Expect negotiations to be technical on the fiscal side; iterative/collaborative; only finished when agreement is reached.

Points Awarded 20 out of 25

Question 5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline.

Comments

Develop concept paper to get CMS buy in. Take first pen; CMS backlog presents challenges; potential administration change could impact process

Points Awarded 18 out of 25.

Oral Evaluator Scoring: ATI Advisory

Question 1. Tell us about the team members assigned to this project. Include a recent example where the team members assigned to this project worked together to meet project expectations.

Comments

Team works with Hawaii; advisers include substantial expertise; breadth and depth.

Points Awarded 9 out of 10

Question 2. Tell us about a time team members had to do a major pivot on a waiver application midstream. How was the pivot handled, and what was the outcome?

Comments

Pivots are to be expected; relevant AZ DSRIP example given risks looking with 2024 election; communications with CMS; engage SMEs; Support CMS with their federal partners; communicate how goals align with CMS.

Points Awarded 18 out of 20

Question 3. Please explain your experience negotiating a waiver that was the first of its kind with CMS. How were key collaborators identified and integrated into the project? What lessons did you learn, and how would you apply those to this project?

Comments

Strong response. AZ tribal example; communication with state/CMS SMEs; details matter; build towards implementation plan; concise vision to support effective communication; develop strategy to get CMS to prioritize, given current backlog; OMB and dual eligible experience

Points Awarded 18 out of 20

Question 4. Please explain how you will handle the research and policy analysis element of this project. How would you determine sufficient research and analysis was completed?

Comments

It's done when we have approval; iterative process; recognize need to work closely with actuarial contractor

Points Awarded 20 out of 25

Question 5. Please outline your approach for this project. Include identified challenges, how you plan to address them, and strategies you will utilize to meet the expected timeline.

Comments

Stagnation is the real risk; iterate with CMS to get to approvable application; implied "first pen" role; stakeholder engagement; respect for state and federal processes, balanced against the need to be creative; Has LTC financing expertise; understands Medicare implications

Points Awarded 23 out of 25