



**STATE OF IOWA
DEPARTMENT OF HUMAN
SERVICES**

**QUALITY ASSURANCE AND QUALITY
CONTROL (QA/QC) SERVICES FOR THE
IOWA MEDICAID MANAGEMENT
INFORMATION SYSTEM (MMIS)
IMPLEMENTATION PROJECT**

RFP # MED-12-014

PUBLIC COPY

**TECHNICAL PROPOSAL
NOVEMBER 7, 2011**



180 N. Stetson
Suite 3200
Chicago, IL 60601

Phone: 312.444.2760
Fax: 312.938.2191
www.csghdelivers.com

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3.2.1 TAB 1: SUBMITTAL INFORMATION

CSG provides the required submittal information on the following pages.

- **Transmittal Letter** – including an executive summary that summarizes the strengths of CSG and key features of our proposed approach to completing the requirements of the RFP
- **Bid Proposal Security** – CSG submits a cashier’s check made payable to the Iowa Department of Human Services in the amount of \$5000. We understand that the bid proposal security shall be forfeited if CSG is chosen to receive the contract and withdraws our bid proposal after the Agency issues a Notice of Intent to Award, does not honor the terms offered in its bid proposal, or does not negotiate contract terms in good faith.

The original cashier’s check is provided immediately following the Transmittal Letter.



**Quality Assurance and Quality Control (QA/QC) Services for
the Iowa MMIS Implementation Project**

Technical Proposal – MED-12-014

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November 9, 2011

Joanne Rockey, Issuing Officer
Iowa Medicaid Enterprise
100 Army Post Road
Des Moines, IA 50315

Re: Iowa Medicaid Enterprise
Quality Assurance and Quality Control Services for the Iowa MMIS Implementation Project

CSG Government Solutions (CSG) appreciates the opportunity to respond to the Quality Assurance and Quality Control for Iowa's MMIS Implementation project Request for Proposal (RFP). Our strategy, technical approach, and proposed team represent the best combination of support for the Iowa Medicaid Enterprise (IME) through the multiple aspects of this critical project. The following Executive Summary outlines the details of our approach and serves to provide an "at a glance" overview of the value we provide to Iowa's Medicaid Program.

The CSG Team



CSG Government Solutions is a Management and Information Technology consulting firm focused on delivering high value solutions for public sector clients. Our three primary practice areas span Strategy, Quality Management, and Systems

Modernization. We focus on Medicaid/Healthcare, Human Services, and Unemployment Insurance. Our client list includes over 20 states and continues to grow.

We employ our REALizeSM suite of proven project, process, and quality management methodologies to plan and design complex Information Technology solutions and to assist our clients in the oversight and quality assurance of their most critical initiatives. This means the CSG Team deployed to Iowa starts with a solid foundation of tools, methods, and knowledge to execute your objectives quickly and accurately. Using REALizeSM, we help our clients transform Information Technology strategies into real operational results. Founded in 1997, CSG has established itself as a leading provider of innovative information technology solutions throughout the United States. CSG specializes in providing Government Solutions. This assures IME that our focus is on your primary business, ensuring a successful implementation and certification of a new MMIS.

CSG has the quality management and quality control experience necessary to ensure a successful outcome for the IME MMIS implementation.

The CSG Difference:

- CSG's quality assurance and control experience with large scale, complex government IT projects will enable IME to reduce risk and ensure a successful MMIS implementation.
- CSG works closely with CMS under contract to develop the MITA Framework 3.0
- We provide deep Medicaid and MMIS expertise coupled with strong MMIS implementation experience.
- CSG has MMIS certification experience and will be instrumental in assisting IA with obtaining CMS certification for the MMIS.
- We understand and have experience with the unique IME environment and will fully support IME with our skills and experience.

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The **CSG Team** brings a wealth of national knowledge and experience to this priority project.

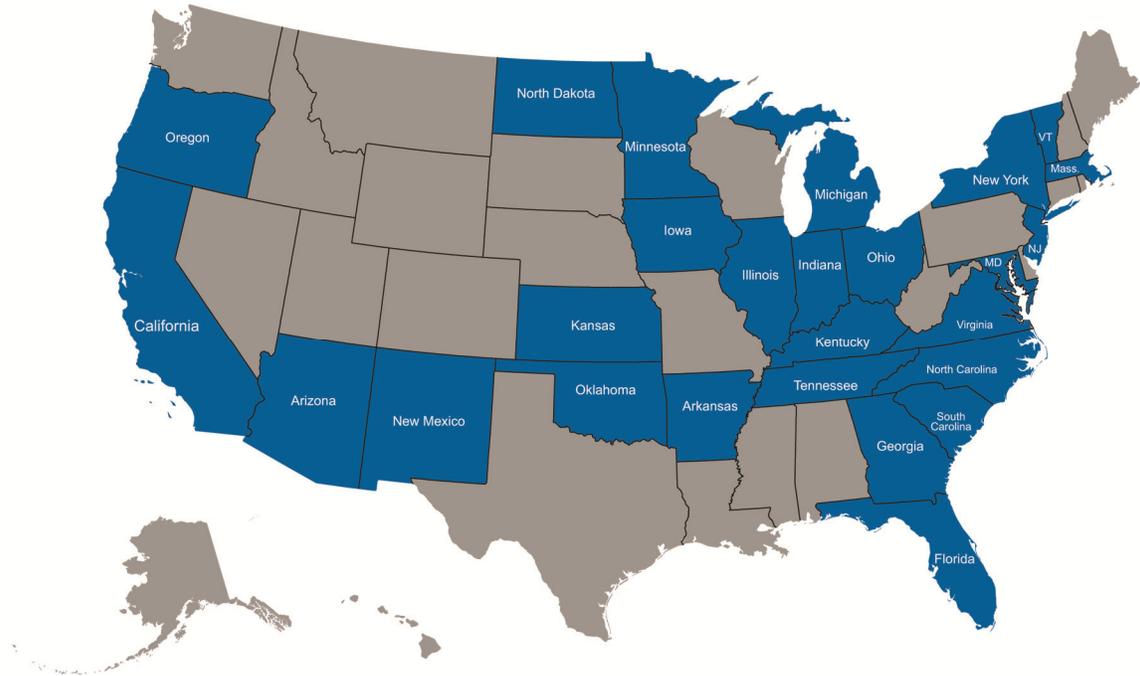


Figure 1: National Experience – The CSG Team works with many states in Medicaid, Healthcare, and other government agencies.

Understanding IME's Project Objectives

Like many states, Iowa has experienced unprecedented health care challenges. State budget issues, retiring employees, and lack of funding for important initiatives result in the need for innovative ways to address issues and create solutions. The Iowa Medicaid Program supports many of the state's citizens by providing comprehensive health care. As the Program expands to include more groups of individuals, more providers, more benefits, improved outcomes, the need for a modern Medicaid Management Information System (MMIS) that seamlessly and efficiently supports Medicaid operations becomes more critical.



We understand your statement of need and the goals for this project:

- Securing services and skills to define, implement and assure that a high standard of quality is achieved throughout the project lifecycle.
- Assisting the Agency with testing requirements related to the breadth and scope of replacing the MMIS and Pharmacy Point-of-Sale (POS) systems and integrating these systems and the MMIS and POS contractors into the IME environment.
- Identifying risks to the MMIS Design, Development, and Implementation (DDI) project and recommending mitigation strategies.
- Integrating Quality Assurance (QA) and Quality Control (QC) services and standards into the MMIS DDI processes to ensure successful transition to operations and Centers for Medicare & Medicaid Services (CMS) certification.

- Assessing the MMIS DDI project for compliance with the Medicaid Information Technology Architecture (MITA) concepts and conducting a MITA 3.0 Gap Analysis and the State Self-Assessment (SS-A) at the conclusion of the DDI phase.
- Supplementing key state staff positions in the quality management of the project.

One of your primary objectives for procuring these IT Consulting Services is to select a team who is experienced with quality assurance for large, complex government projects, reducing and mitigating risk, and providing testing oversight and experience. By leveraging and expanding our existing QA/QC methods and standards currently supporting the IME HIPAA 5010 and ICDE-10 Technical Assistance and Support project, we will reuse and modify our proven processes and methodologies to accelerate project start-up. Our extensive experience will reduce your risk and significantly increase the probability for a successful MMIS implementation.

Additionally, CSG is a key contractor for the development of MITA Framework 3.0 and will bring first-hand expertise to IME on the upcoming changes and impacts of the revised MITA Framework. We are a trusted advisor to CMS and many states and plan to support IME leveraging this breadth of knowledge.

The CSG Team is well-positioned to deliver your QA/QC and MITA services. The CSG Team includes many individuals who have years of experience and well-connected to the broader Medicaid and Health Care landscape including requirements for CMS MMIS certification, MITA, Health Information Technology for Economic and Clinical Health (HITECH), Health Care Reform, and Health Insurance Portability Accountability Act (HIPAA).

The CSG Team Difference

Following are key differentiators that set the CSG Team apart from our competitors:

- We operate with **honesty and integrity**, bidding from a well-developed work breakdown structure supporting the number and type of resources necessary to bring you through this project successfully. When contracted, we provide the right people at the right time, and as proposed.
- Our project approach to completing the work for IME leverages our proven **REALizeSM methodologies**, providing our joint project team with proven tools, methods, and knowledge for quality assurance, risk control and mitigation, and testing oversight.
- As highlighted above, **CMS selected CSG Government Solutions** as part of the team supporting their efforts to evolve the MITA Framework. We have a front row seat to the changes impacting IME and keep our clients on the forefront of developments and CMS expectations.
- Our project approach to completing the work for IME leverages our proven **REALizeSM methodologies**, providing our project team with proven tools, methods, and knowledge.
- Our **participation in the Medicaid and health care industry** represents our investment in your project. We connect across the nation to efforts and individuals to ensure we use the most up-to-date material available in every facet of your project. Our support of the Medicaid industry and expertise is demonstrated by our assignment to present at 16 different **2011 MMIS Conference** sessions covering MITA 3.0, Health Information Technology (HIT)/Health Information Exchange (HIE), MMIS, Medicaid Standards and System Modernization.

- The **CSG Team, the actual people** who are on the ground with you in Des Moines, are true experts in MMIS systems, MITA, MMIS certification, and the broader Medicaid and Health Care landscape. Several of our team members have served in State government for many years and we are all vested in the health of the state recipients. On the foundation of their experience, their dedication to your project supports the IME stakeholders from beginning to successful conclusion.

Technical Approach Overview

The CSG Team begins every engagement on the foundation of our **REALizeSM** methodology. REALizeSM is a set of tools, methods, and knowledge designed to carry forward lessons learned and best practices from industry, other projects, and our **Centers of Excellence (CoE)**. The CoE Team maintains comprehensive status updates from national initiatives, marketplace research, participation in industry collaboration, and our project teams in the field to ensure our REALizeSM methodology is always evolving.

Access to the CoE teams and recurring updates to the methodology are critical. As our nation moves toward widespread health care reform and the Medicaid expansion becomes a reality, working with the CSG Team provides assurance we are continually incorporating new developments into your project processes. Migration to the new **MITA 3.0** standards, including SS-A, is also closely monitored for new developments such as the Enhanced Funding Requirements: Seven Conditions and Standards, requirements influencing your MMIS/MITA alignment, MMIS modernization, and MMIS certification.

For the IME QA/QC project, we deploy several of the focused methodologies to encompass all the tasks required in the RFP, as shown in Figure 2. These include **REALize-PMSM**, **REALize-MITASM**, and **REALize-MMISSM**. Each of these methodologies includes all the tasks, activities, and artifacts the CSG Team uses in working with state stakeholders to realize the goals and objective for each engagement.

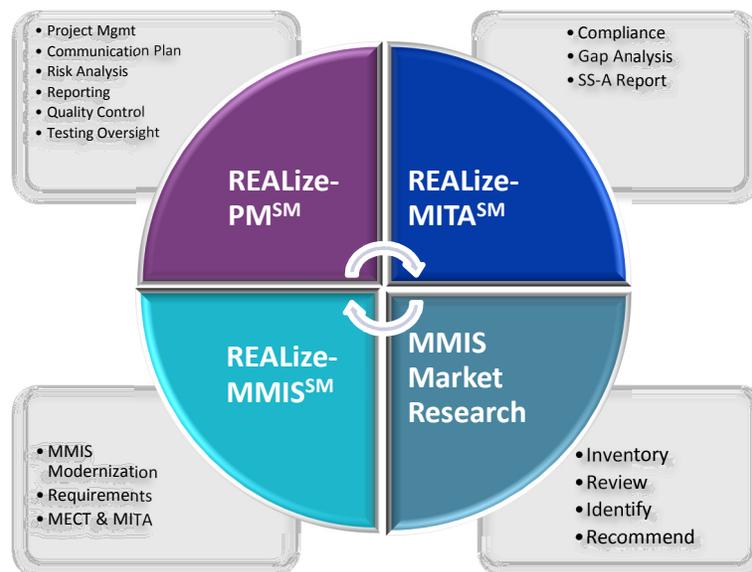


Figure 2: REALizeSM – The combination of four established methodologies provides the foundation for ensuring quality assurance and control for the successful implementation of the Iowa MMIS.

The combination of these individual approaches creates a project framework leveraging specific attention to each area with a comprehensive approach to coordinating the efforts. We include more details about the approach in Section 3.2.4 of our proposal.

Summary

We are committed to providing quality assurance and control that will result in the successful implementation and certification of a new, modernized Iowa MMIS. Our investment in developing "next generation" methodologies to help you move through process and technology improvement is comprehensive. We welcome the opportunity to discuss our proposal with you in further detail. The CSG Team wishes you ultimate success in this important endeavor and hopes to have the opportunity to help you realize your goals.

I, Tim Lenning, Executive Vice President, am the official CSG contact and am authorized to legally bind CSG to the provisions of the RFP and resulting contract. I am also authorized to answer any other questions related to the information presented in our proposal. My contact information is provided below:

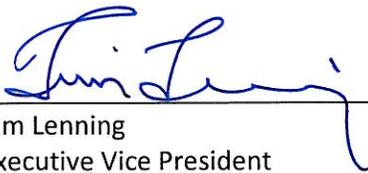
Tim Lenning, Executive Vice President
180 N. Stetson Avenue, Suite 3200
Chicago, IL 60601

Phone: (312) 423-2111
Fax: (312) 938-2191
Email: tlenning@csgdelivers.com

CSG's Bid Bond Security, made payable to the Iowa Department of Human Services in the amount of \$5000, is provided immediately following this transmittal letter.

We appreciate the opportunity to respond to this RFP and look forward to working with the State of Iowa on the MMIS Implementation Project. Please contact me should you have questions related to the information presented in our proposal.

Sincerely,



Tim Lenning
Executive Vice President
CSG Government Solutions

Attachments:

- Bid Proposal Security

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3.2.3 TAB 3: RFP FORMS

CSG's completed and signed RFP Forms are provided on the following pages. Please note, CSG is not proposing the use of any subcontractors to perform the scope of work described in the RFP. Per the submission instructions on Attachment C: Subcontractor Disclosure Form, we have not returned the form with our proposal.

- Attachment A: Release of Information Form
- Attachment B: Primary Bidder Detail & Certification Form
- Bid Proposal Certification
- Attachment C: Subcontractor Disclosure Form – **Not Applicable**



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Attachment A: Release of Information

(Return this completed form behind Tab 3 of the Bid Proposal.)

CSG Government Solutions, Inc. (name of bidder) hereby authorizes any person or entity, public or private, having any information concerning the bidder’s background, including but not limited to its performance history regarding its prior rendering of services similar to those detailed in this RFP, to release such information to the Agency.

The bidder acknowledges that it may not agree with the information and opinions given by such person or entity in response to a reference request. The bidder acknowledges that the information and opinions given by such person or entity may hurt its chances to receive contract awards from the Agency or may otherwise hurt its reputation or operations. The bidder is willing to take that risk. The bidder agrees to release all persons, entities, the Agency, and the State of Iowa from any liability whatsoever that may be incurred in releasing this information or using this information.

CSG Government Solutions, Inc.
Printed Name of Bidder Organization

Tim Lenning
Signature of Authorized Representative

11/3/2011
Date

Tim Lenning, Executive Vice President
Printed Name





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Attachment B: Primary Bidder Detail Form & Certification

(Return this completed form behind Tab 3 of the Proposal. If a section does not apply, label it “not applicable”.)

Primary Contact Information (individual who can address issues re: this Bid Proposal)	
Name:	Tim Lenning
Address:	180 N. Stetson Avenue, Suite 3200, Chicago, IL 60601
Tel:	312-423-2111
Fax:	312-938-2191
E-mail:	tlenning@csgdelivers.com

Primary Bidder Detail	
Business Legal Name (“Bidder”):	CSG Government Solutions, Inc.
“Doing Business As” names, assumed names, or other operating names:	Not Applicable
Parent Corporation, if any:	Not Applicable
Form of Business Entity (i.e., corp., partnership, LLC, etc.):	S-Corporation
State of Incorporation/organization:	Illinois
Primary Address:	180 N. Stetson Avenue, Suite 3200 Chicago, IL 60601
Tel:	312-444-2760
Fax:	312-938-2191
Local Address (if any):	
Addresses of Major Offices and other facilities that may contribute to performance under this RFP/Contract:	
Number of Employees:	79
Number of Years in Business:	14
Primary Focus of Business:	CSG is a mid-size IT management consulting firm with expertise in healthcare, unemployment insurance, and other government programs and systems. We specialize in project planning and oversight, system design and implementation, and independent verification and validation. We work throughout the U.S., primarily for state governments.
Federal Tax ID:	36-4150867
Bidder’s Accounting Firm:	Cukierski & Kowal, LLC
If Bidder is currently registered to do business in Iowa, provide the Date of Registration:	Yes, CSG is registered to do business in Iowa. Date of registration: January 24, 2005
Do you plan on using subcontractors if awarded this Contract? {If “YES,” submit a Subcontractor Disclosure Form for each proposed subcontractor.}	NO

Request for Confidential Treatment (See Section 3.1)		
Location in Bid (Tab/Page)	Statutory Basis for Confidentiality	Description/Explanation
Section 3.2.4 (Tab 4/Pages 29-74) &	Iowa Code Chapter 22.7(3)	CSG invokes the Trade Secrets exemption defined in Iowa Code, Chapter 22.7. The DHS RFP requests services for a complex and narrow effort





<p>Appendix A (Pages 205-273)</p>		<p>related to quality assurance and quality control over the replacement of the current MMIS/POS systems, and the assessment and analysis of the State of Iowa’s Medicaid Information Technology Architecture (MITA). Every state government in the country is mandated to address this issue in the near future. States are seeking vendors with a thorough, cost-effective approach to meeting the mandates.</p> <p>These pages describe CSG’s specific plan for accomplishing this task. CSG has been selected to do this work for other states, and we are emerging as a leading expert in this field. Learning the specifics of how we accomplish the effort is of crucial immediate competitive value as multiple other states are at this moment issuing RFPs for this exact purpose. Acquiring this knowledge through disclosure of these pages would allow a competitor to catch up quickly in a fast-moving market.</p> <p>Our approach to the project is based on CSG’s proprietary methods and automated tools built specifically to provide MITA and MMIS assessment and analysis services to state governments. These methods and tools have been developed through the investment of thousands of hours of effort by CSG. Providing this knowledge to a competitor would harm CSG by unfairly reducing our competitive advantage in the many similar RFPs being issued around the country. Disclosing this information would also give a competitor the financial advantage of acquiring this valuable knowledge wholly at CSG’s expense. Such knowledge would be extremely expensive to acquire by other means, and even more difficult to acquire quickly enough to keep up with the market. This information clearly meets the basic criteria for protection as a trade secret: it is a compilation of information that is secret, of value, for use in CSG’s business, and of advantage to our business over those who do not know or use it.</p>
<p>Section 3.2.5.1 (Tab 5/Pages 81-102)</p>	<p>Iowa Code Chapter 22.7(3)</p>	<p>CSG invokes the Trade Secrets exemption defined in Iowa Code, Chapter 22.7.</p> <p>These pages contain the names, phone numbers, and business relationships of specific and special clients of CSG. The pages also contain detailed descriptions of the services CSG provides to these clients. We do not publish this information for any purpose other than directly pursuing business with a potential client, and with an explicit statement of confidentiality.</p> <p>These clients permitted their names and other information to be used as references for this RFP, with the expectation that they will not be exposed to third parties with unknown legal or commercial objectives.</p> <p>The nature of CSG’s business (as well as our competitors), demands that strong, trusted relationships are built with a limited number of clients. CSG has spent countless hours and millions of dollars over many years to discover these clients, determine and serve their needs, build ongoing business relationships with them, and earn their permission to use them as references. Their names and contact information, along with a description of their business and specific need for the type of services provided by</p>



		<p>CSG, is of the highest competitive value. The information is current, reliable, detailed and accurate. Such specific intelligence regarding sales prospects is earnestly sought by our competitors in order to pursue business with these clients. This information would cost hundreds of thousands of dollars to acquire by other means, if it could be completely acquired at all.</p> <p>Disclosure of this information would cause competitive disadvantage to CSG by providing to a competitor deep knowledge of business opportunities with CSG clients that are currently unknown to that competitor. This information meets the basic criteria for protection as a trade secret: it is a compilation of information that is secret, of value, for use in CSG’s business, and of advantage to our business over those who do not know or use it.</p> <p>In addition to the competitive harm described above, its disclosure could also harm CSG by damaging valuable business relationships in the event that our clients receive unsolicited and/or unwanted calls from a competitor or other parties.</p>
<p>Section 3.2.5.2.3 (Tab 5/Pages 109-172)</p>	<p>Iowa Code Chapter 22.7(3)</p>	<p>CSG invokes the Trade Secrets exemption defined in Iowa Code, Chapter 22.7.</p> <p>The resumes and biographies included in these sections contain the names and detailed work history of CSG’s staff. We do not publish this information for any purpose other than directly pursuing business with a potential client, and with an explicit statement of confidentiality.</p> <p>CSG competes in a market for consulting services that are extremely specialized. Identifying, pursuing, and evaluating people who have the exact qualifications that allow us to survive in this market is expensive and time-consuming. CSG (a small business) spends over \$300,000 per year searching for and evaluating the qualifications of candidates for positions in our company.</p> <p>CSG’s employees are obviously free to publish their own personal resumes or send one to whomever they wish. However, these sections were written by CSG, at CSG’s expense, for the sole purpose of providing Iowa the information needed to evaluate our proposal. Viewed as a whole, it is a value-added compilation of qualified people with detailed work histories that is a by-product of thousands of hours of searching and evaluation by CSG. To a competitor, its value is comparable to the product of an executive search or other staffing firm. Freely providing this information to a competitor harms CSG. It offers the competitor an organized set of value-added recruiting knowledge that would cost many thousands of dollars in labor and fees to acquire by other means, and is most valuable for the purpose of attempting to hire CSG’s employees.</p> <p>We believe this value-added compilation of qualified people with detailed work histories, viewed as a whole, is confidential Trade Secrets as referenced in the Iowa Code, Chapter 22.7. Its disclosure would allow a competitor to unfairly gain financial and competitive advantage by: (i) acquiring an organized set of value-</p>





		added recruiting knowledge developed wholly at CSG’s expense, and (ii) leveraging CSG’s own recruiting investment while attempting to hire CSG’s most valuable employees.
Section 3.2.5.3 (Tab 5/Pages 173-202)	Iowa Code Chapter 22.7(3)	CSG invokes the Trade Secrets exemption defined in Iowa Code, Chapter 22.7. CSG Government Solutions, Inc. is a privately held company and does not publish financial statements, except as required by law or by potential clients evaluating proposals. By protecting this information, CSG precludes competitors from using it to develop strategies in future direct competition with CSG. In addition, potential competitors can analyze our financial data to support their own decision-making about the profitability or other business advantages of entering or positioning themselves in our markets. Since we are not required to make this financial data public, disclosing it removes competitive advantages we rightfully possess as a privately held company by: (i) providing direct competitors with financial intelligence about CSG, and (ii) providing potential competitors with valuable market data, without benefit to CSG.

Exceptions to RFP/Contract Language (See Section 3.1)			
RFP Section and Page	Language to Which Bidder Takes Exception	Explanation and Proposed Replacement Language:	Cost Savings to the Agency if the Proposed Replacement Language is Accepted
1.9.1 Contract Payment Methodology p. 13	“The Contractor may invoice the Agency for 1/12th of the annual fixed price during each month of the Contract. The Agency will pay 80% of the invoice value. The remaining 20% may be invoiced by the Contractor at the conclusion of the project after the Agency has confirmed during the close-out of the project that the Agency has approved all deliverables, all performance measures were	<p>We would like to modify this language to reflect the payment methodology found in the contract between the Iowa Department of Human Services and CSG for the Iowa Medicaid Enterprise HIPAA 5010 and ICD-10 Technical Assistance and Support Services: Contract MED-09-017.</p> <p>In that contract there is a 20% holdback, but the holdback is reconciled at the end of each fiscal year, rather than the end of the entire contract term.</p> <p>Our request is based on the following:</p> <ol style="list-style-type: none"> 1. The duration of this contract is primarily dependent on the MMIS contractor and the State. 2. Because of the nature of the work to be performed by CSG, the value of our services is received as our deliverables are produced and approved. 3. A 20% holdback over the duration of 	<p>If this language is changed, CSG’s financing cost for the holdback will be reduced by \$20,300 over the term of the contract.</p> <p>CSG’s total price will be reduced by this amount.</p>





	<p>met satisfactorily, and the Contract has been completely closed out.”</p>	<p>the contract could result in a total holdback of well over \$1,000,000. Eventually the total holdback would be larger than the entire cost of the remaining services and deliverables.</p> <p>We request that section “1.9.1 Contract Payment Methodology” on page 13 of the RFP, be changed to the following:</p> <p>“The Contractor may invoice the Agency for 1/12th of the annual fixed price during each month of the Contract for that fiscal year. The Agency will pay 80% of the invoice value. The remaining 20% of the annual fixed price for that fiscal year may be invoiced by the Contractor at the conclusion of the project end of that fiscal year after the Agency has confirmed during the close-out of the project that the Agency has approved all deliverables for that fiscal year, and all performance measures were met satisfactorily, and the Contract has been completely closed out.”</p>	
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BID PROPOSAL CERTIFICATION

By signing below, Bidder certifies that:

- Bidder accepts and will comply with all Contract Terms and Conditions contained in the Sample Contract without change except as otherwise expressly stated in the Primary Bidder Detail Form & Certification.
- Bidder has reviewed the Additional Certifications, which are incorporated herein by reference, and by signing below represents that Bidder agrees to be bound by the obligations included therein.
- Bidder does not discriminate in its employment practices with regard to race, color, religion, age (except as provided by law), sex, marital status, political affiliation, national origin, or handicap;
- No cost or pricing information has been included in the Bidder's Technical Proposal;
- Bidder has received any amendments to this RFP issued by the Agency;
- Bidder either is currently registered to do business in Iowa or agrees to register if Bidder is awarded a Contract pursuant to this RFP;
- The person signing this Bid Proposal certifies that he/she is the person in the Bidder's organization responsible for, or authorized to make decisions regarding the prices quoted and he/she has not participated, and will not participate, in any action contrary to the anti-competitive agreements outlined above;
- Bidder specifically stipulates that the Bid Proposal is predicated upon the acceptance of all terms and conditions stated in the RFP and the Sample Contract without change except as otherwise expressly stated in the Primary Bidder Detail Form & Certification. Objections or responses shall not materially alter the RFP. All changes to proposed contract language, including deletions, additions, and substitutions of language, must be addressed in the Bid Proposal;
- Bidder certifies that the Bidder organization has sufficient personnel resources available to provide all services proposed by the Bid Proposal, and such resources will be available on the date the RFP states services are to begin. Bidder guarantees personnel proposed to provide services will be the personnel providing the services unless prior approval is received from the Agency to substitute staff;
- Bidder certifies that if the Bidder is awarded the contract and plans to utilize subcontractors at any point to perform any obligations under the contract, the Bidder will (1) notify the Agency in writing prior to use of the subcontractor, and (2) apply all restrictions, obligations, and responsibilities of the resulting contract between the Agency and Contractor to the subcontractors through a subcontract. The Contractor will remain responsible for all Deliverables provided under this contract.
- Bidder guarantees the availability of the services offered and that all Bid Proposal terms, including price, will remain firm until a contract has been executed for the services contemplated by this RFP or one year from the issuance of this RFP, whichever is earlier; and,
- Bidder certifies it is either a) registered or will become registered with the Iowa Department of Revenue to collect and remit Iowa sales and use taxes as required by Iowa Code chapter 423; or b) not a "retailer" of a "retailer maintaining a place of business in this state" as those terms are defined in Iowa Code subsections 423.1(42) & (43). The Bidder also acknowledges that the Agency may declare the bid void if the above certification is false. Bidders may register with the Department of Revenue online at:
<http://www.state.ia.us/tax/business/business.html>.

By signing below, I certify that I have the authority to bind the Bidder to the specific terms, conditions and technical specifications required in the Agency's Request for Proposals (RFP) and offered in the Bidder's Proposal. I understand that by submitting this Bid Proposal, the Bidder agrees to provide services described herein which meet or exceed the requirements of the Agency's RFP unless noted in the Bid Proposal and at the prices quoted by the Bidder. I certify that the contents of the Bid Proposal are true and accurate and that the Bidder has not made any knowingly false statements in the Bid Proposal.

Signature:	
Printed Name/Title:	Tim Lenning, Executive Vice President
Date:	November 3, 2011



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3.2.4 TAB 4: CSG'S APPROACH TO MEETING KEY ACTIVITIES

In the following section, we explicitly define our technical approach to addressing the key activities and deliverables outlined in the RFP. CSG fully understands the IME project objectives and is entirely able to provide all of the requirements as specified. CSG has developed a unique, robust set of software tools that will be used in completing the scope of work including all oversight and monitoring activities. An overview of these tools and methodologies is described below. Beginning in Key Activity 1 we provide more detail for how our tools will be used to specifically address each Key Activity and to enable and support the production of the required deliverables.

CSG has a proven approach to meeting key activities described in the RFP.

- Customized Project Planning
- Industry Standard QA/QC Methods and Standards
- First-hand Expertise on the upcoming changes and impacts of the revised MITA Framework
- MITA 3.0 Aligned SS-A Methodology

CSG REALizeSM Overview



In 2009, CSG launched the CSG Tech Innovation Lab and Centers of Excellence to support the development and delivery of leading-edge solutions to government agencies. Our research and innovation efforts have produced CSG REALizeSM, a proprietary collection of public sector system modernization knowledge, techniques and automated tools that provide our project teams with superior capability and insight. With CSG REALizeSM, we leverage the accumulated experience of our people, our thorough industry research, and our innovative automated tools to provide maximum value for our clients' system modernization investments.

CSG REALizeSM products fall into three categories:

1. Maturity Models, Best Practices, and High-Value Artifacts
2. CSG REALizeSM Tools : *"Powered by TeamCSGSM"*
3. Customized CSG REALizeSM Project Roadmaps

These products are continuously launched and improved in the CSG Centers of Excellence:

- Healthcare and Human Services
- IV&V/Quality Management
- Project Management/PMO
- Unemployment Insurance

Through the Centers of Excellence, all of our consultants in the field apply their experience and lessons learned to assure that CSG REALizeSM provides maximum added value to our clients and project teams. Our consultants are supported by CSG Tech's team of research assistants and technologists who build the high-quality artifacts and software that effectively apply CSG's industry-leading practices to our clients' biggest challenges.

Every CSG employee has access to the entire collection of CSG REALizeSM products on a CSG-issued tablet device. Updates to CSG REALizeSM are automatically downloaded to the tablets on a regular basis.

CSG REALizeSM Maturity Models, Best Practices, and High-Value Artifacts

CSG REALizeSM Functional and Technical Maturity Models structure and inform the development of public sector system modernization strategies. The models, derived from the research and experience of CSG's Centers of Excellence, are valuable guides for gaining consensus on program goals and objectives, and for documenting the business requirements for new systems.

CSG REALizeSM also provides straightforward guides to best practices, program-specific dictionaries, handbooks for conducting system and operational assessments, and many other high-value models, guides and artifacts.

CSG REALizeSM Tools: "Powered by TeamCSGSM"

CSG REALizeSM provides automated tools that support and promote high-quality system modernization efforts. These support project management, the tracing of system requirements and other data, and performing risk assessments. The tools may be customized for particular projects and are accessed through a secure, standard TeamCSGSM collaboration site customized and deployed for each client project.



Three families of CSG REALizeSM tools are currently in use by our project teams:

- **TeamCSGSM Project Tracker** is an easy-to-use project management support tool that provides powerful tracking and reporting capabilities for controlling issues, risks, and changes throughout the project life cycle.
- **TeamCSGSM Tracer** provides flexible, configurable traceability and reporting throughout the system planning and development life cycle. Customized versions of **TeamCSGSM Tracer** contain baseline system requirements and other entities and artifacts.
- **TeamCSGSM Risk Assessment Models** provide flexible tools to assess our clients' project risks from four perspectives: Project Management, IT Infrastructure, System Development Life Cycle, and **MMIS Operational Readiness**.

TeamCSGSM Portal and Project Sites

TeamCSGSM is a web-based, production-level platform that provides 24/7 communication, collaboration, and management capability throughout the company. It allows our geographically dispersed work force to be productive at all times. It provides an established support structure, shared workspaces, and access to our CSG REALizeSM automated tools. Customized TeamCSGSM sites are deployed for every project team in the field and for internal operations and business development teams.

The TeamCSGSM project sites are secure and customized to provide maximum value to all project team members. The site is hosted, administered and managed by CSG Tech.

Customized CSG REALizeSM Project Roadmaps

For each project, **CSG REALizeSM provides a customized, value-added Roadmap**. The Roadmap is an easy-to-read depiction of the project's work breakdown structure and is synchronized with the project work plan. It describes all project activities, and indicates the use of applicable CSG REALizeSM handbooks, models and automated tools.



The Roadmap is divided into two sections. The top half describes the project from initiation to project closure moving from left to right. The project is organized into work streams and tasks. The work streams are identified by the blue boxes and the tasks by the red boxes. A work stream is a collection of related tasks that lead to the creation of a project deliverables or work product.

The bottom half of the roadmap shows the key supporting models and tools for the project. For each roadmap there are typically 2 – 3 high impact tools that are identified in this section. In most cases the tools listed will be specific to the type of project.

Iowa IME MMIS Implementation Project QA/QC Services Roadmap

The diagram on the next page depicts the customized **Roadmap for the entire QA/QC Services** for the Iowa MMIS Implementation Project. The Roadmap reflects the CSG Team’s experience on similar projects in other states, our expertise and research in Medicaid systems, and the particular characteristics of this project.



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Key Activity #1

Develop a Quality Management Plan that covers all phases and functions of the System Services design, development and implementation (DDI) and integration of the project including but not necessarily limited to these areas of focus:

- Planning oversight
- Project management
- Quality management
- Knowledge transfer
- Requirements management
- Operating environment
- Software development
- System and acceptance testing
- Data management (including conversion and interfaces)
- Transition
- Operations oversight

Deliverables:

- Quality Management Plan.
- Walkthroughs of materials submitted to the Agency for approval.



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Performance Measures:

- An initial Quality Management Plan shall be received by the Agency within 10 business days of the start date of the Contract.
- After review with the Agency the Contractor shall submit a final Quality Management Plan for Agency approval within 5 business days of the review with the Agency.

Monitoring:

- The Agency's Project Director will review and approve the Quality Management Plan.

Key Activity #2

Provide a work breakdown structure (WBS) for all QA/QC activities for Agency approval.

Deliverables:

- Work Breakdown Structure (WBS)

]











Performance Measures:

- Within 15 business days of the start date of the Contract submit an initial WBS for Agency approval within 5 business days.
- Throughout the lifecycle of the project keep the WBS updated so the Agency has a document that is current at all times.

Monitoring:

- The Agency's Project Director will check at a minimum each quarter to authenticate the WBS is kept up to date.

Key Activity #3

Schedule, facilitate and document in writing all project meetings that are necessitated as part of the QA/QC scope of work.

Deliverables:

- Written agendas
- Written minutes to all meetings
- Other materials as identified

Performance Measures:

- All agendas will be prepared and distributed at least 1 business day before meetings.
- In the instance of general QA/QC meetings, distribute meeting notes to meeting participants within 2 business days of meeting and post notes to the project library.
- All other materials will be presented to board members prior to meeting times.
- All materials (agendas, minutes, other materials) will be retained in a project library location within 1 business day of approval of materials.

Monitoring:

- The Agency's Project Director will check for completeness of library materials at least quarterly.

Key Activity #4

Apply a defined method and set of standards used to identify and report defects, problems or issues detected in QA/QC reviews. The QA/QC focus will be directed at assessing the following areas of the project including but not necessarily limited to:

- Project environment
- Expectations
- Technical approach
- Project schedule
- Project deliverables and documentation
- Resources
- Communications
- Project leadership
- Executive commitment
- Risk tolerance
- Project controls
- Credibility and integrity

Deliverables:

- Written methodology and standards.
- Written assessments.
- Electronic log of all defects and dates the defects are cured.



Performance Measures:

- Written methodology and standards are due to the Agency for approval within 15 business days of the beginning of the Contract.
- Written assessments are due by the 10th day following the last day of the quarter for Agency approval.

Monitoring:

- The Agency's Project Director will approve all standards and assessments.

Key Activity #5

Assess the entire MMIS DDI project's compliance with the terms and requirements of the MITA concepts and maintain familiarity with the most up-to-date MITA framework and provide the State with updates based on changes to MITA. At the conclusion of the DDI update Iowa's State Self-Assessment (SS-A) under the most current release of the MITA framework.

Deliverables:

- Initial report on compliance of the MMIS DDI project to the MITA concepts and principles.
- Written reports on MITA updates and impacts to the MMIS DDI project.
- MITA SS-A.



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Performance Measures:

- Within 60 calendar days of initiation of MMIS DDI project submit for Agency approval the initial compliance report to the Agency Project Director.
- Within 30 calendar days of a CMS release, update the Agency through written reports to the MITA framework and impacts.
- Deliver all reports to the Executive Sponsors and the other Agency Project Directors associated with the project.
- Within ninety (90) days of the start of the MITA SS-A complete the SS-A and submit to the Agency for approval.
- Submit the approved SS-A to CMS within 7 days of approval by the Agency.
- Within 7 days of approval by the Agency add the SS-A to the project library.

Monitoring:

- The Agency's Project Director will receive the MITA SS-A and all reports and check to ensure appropriate distribution has occurred.

Key Activity #6

Provide quality reviews and quality assurance and quality control audits throughout the duration of the project on the following:

- Deliverables
- Test plans
- Documentation
- Business processes and procedures
- Data conversion
- Interfaces
- Transition

Deliverables:

- Written standards for all items above.
- A schedule of quality assurance and quality control audits for the duration of the System Services project.
- Written reports of the results of all quality reviews and audits.



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Performance Measures:

- Within 30 business days of the start date of the Contract submit an approval-ready, written report of quality standards for Agency approval.
- Within 15 business days of the start date of the System Services project submit an approval-ready schedule of quality assurance and quality control audits for Agency review and approval.
- Within 5 business days of the completion of each quality assurance and quality control audits submit an approval-ready report for the Agency's approval.

Monitoring:

- The Agency's Project Director will periodically check the project library to validate reports are according to the approved schedule.

Key Activity #7

Cooperate fully with all other contractors on the project to allow a smooth integration and transition to IME operations.

Deliverables:

- A Communication Management Plan to show how quality assurance and quality control will integrate with other contractors on the project.
- The Communication Management Plan must integrate with the project's master communication plan developed by the Project oversight, management and integration contractor.

Performance Measures:

- Initial Communication Management Plan will be approval ready and delivered to the Agency within 15 business days of the start date of the Contract.
- Updates to the Communication Management Plan will be due quarterly.



Monitoring:

- The Agency's Project Director will verify the initial Communication Management Plan integrates with the master communication management plan and that updates are filed quarterly.

Key Activity #8

Provide technical assistance to all IME units in the area of test plan development, execution of test plans, review of test plan results, and integration testing.

Deliverables:

- A master plan developed around each phase of testing and the interaction with IME units and contractors as anticipated.
- Outreach reports identifying how the technical assistance is provided.
- Monthly summary reports on technical assistance provided to IME units and contractors.



Performance Measures:

- Within 30 business days of the start date of the Contract submit an approval-ready master plan identifying all types of testing and the anticipated technical assistance to other contractors.
- Upon completion of each outreach event, submit a summary report to the Agency's Project Director within 5 business days of the end of the event.
- No later than noon on the 5th business day of each month following the last day of the preceding month provide an approval-ready monthly summary report to the Agency's Project Director.

Monitoring:

- The Agency's Project Director will check the project library at least quarterly to make sure all required reports are approved and in the project library.

Key Activity #9

Review all results of the levels of testing including system testing, unit testing, user testing, regression testing and integration testing and report areas of risk and issues.

Deliverables:

- Written summary reports on test results.
- Risk report.
- Corrective actions plan.



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Performance Measures:

- Within 5 business days of the conclusion of each testing phase, deliver the summary reports, corrective action plans, and the risk reports to the Agency's Project Director for approval.
- Follow up with all corrective action plans through resolution.
- Make recommendations to the Agency's Project Director and Executive Steering Committee about risk mitigation within 5 business days of risk identification.

Monitoring:

- The Agency's Project Director will track all summary reports, risk reports and corrective action plans until issues are closed.

Key Activity #10

Assist and supplement IME subject matter experts (SME) with performance of user acceptance testing (UAT) and integration testing as identified and needed by the Agency.

Deliverables:

- A UAT/integration testing plan in the areas identified by the Agency to be in need of assistance.
- Written test cases.
- A written report on all UAT/integration test results including all follow-up testing.



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Performance Measures:

- Within the timeframe approved by the Agency in the testing plan, complete all test cases to a satisfactory conclusion.
- The final written report will be presented to the Agency within 5 business days of the conclusion of the testing.

Monitoring:

- The Agency's Testing Manager in charge of policy staff testing will verify all work has been performed satisfactorily.

Key Activity #11

Review and provide technical assistance on all new or modified IME operational procedures prior to IME units submitting the operational procedures to the Agency for approval.

Deliverables:

- Written standards for the review of new or modified IME operational procedures.
- Monthly written summary reports of technical assistance provided.

Performance Measures:

- Assist the IME staff within 2 business days of request for assistance.
- Provide the written standards to the Agency's Project Director within 30 business days of start date of the contract.

Monitoring:

- The Agency's Project Director will approve the written standards within 10 business days of submission.
- The Agency's Project Director will spot check requests for assistance to validate timely assistance.

Key Activity #12

Produce a “go live” checklist and execute the checklist to assess operational readiness.

Deliverables:

- Checklist form.
- Completed checklist.



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Performance Measures:

- Provide the written checklist to the Agency's Project Director within 30 business days of start date of the contract.
- Execute the checklist at intervals approved in the Agency work plan.

Monitoring:

- The Agency's Implementation Manager will review the results of the completed checklist.

Key Activity #13

Monitor operations and identify risks and issues for resolution.

Deliverables:

- Weekly and monthly written status reports.
- Written risk mitigation strategies for risks identified.
- Written issues log.



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Monitoring:

- The State's Risk Manager will review contractor's deliverables and performance monthly.

Key Activity #14

Set standards for all transition plans and approve all transition planning and all transition plans.

Deliverables:

- Summary of all transition planning.
- Written set of transition plan standards.
- A log of all approved transition plans.

Performance Measures:

- Written set of transition plan standards are due to the Agency for approval at least 8 months prior to the “go live” date.
- The summary of all transition planning is due to the Agency for approval at least 3 months prior to the “go live” date.
- The log of all approved transition plans is due to the Agency for approval at least 2 months prior to the “go live” date.

Monitoring:

- The State’s Transition Manager will review contractor’s deliverables and performance monthly.

Key Activity #15

Provide expertise and administrative support on the MMIS certification process or other QA/QC issues during any CMS review of DDI, or initial Operations.

Deliverables:

- Agendas and meeting minutes on any meetings related to certification or a challenge.
- A work plan for the certification project.
- Status reports on progress of certification project.

Performance Measures:

- Sixty days prior to “go live” date submit a work plan for Agency’s approval on the certification project.
- Submit a schedule of meetings for certification planning project no later than the “go live” date.
- Agenda’s shall be distributed at least 2 business days prior to meetings.
- Meeting minutes shall be submitted to Agency for approval within 2 business days of meeting being held.

Monitoring:

- The State’s Certification Manager will review performance of the contractor on a monthly basis.

3.2.5 TAB 5: CSG'S BACKGROUND

CSG Government Solutions is a Management and Information Technology consulting firm focused on delivering high value solutions for our clients. We employ our REALizeSM suite of innovative methods, knowledge and automated tools to help our clients successfully leverage technology to modernize critical program enterprises. Founded in 1997, CSG has established itself as a leading provider of innovative information technology solutions for over 150 government and commercial organizations throughout the U.S.



Specialists in Government Solutions. Focused on Delivering Results

Now, more than ever, government agency decision makers are turning to technology to deliver better service, satisfy increased constituent demands, improve performance, increase information sharing, and streamline operations, systems, workflows, and processes. To help our clients achieve their objectives, CSG provides Strategy and Planning, Quality Management, and Systems Modernization services:

<i>Strategy and Planning</i>	<i>IV&V/Quality Management</i>	<i>Systems Modernization</i>
Enterprise IT Strategy Planning & Requirements Enterprise Technical Architecture Procurement Support	Project Management / PMO Independent Verification and Validation (IV&V) Quality Assurance Independent Testing	Technical System Design Business Process Design Software Development and Testing Deployment and Training

We take a collaborative approach to working with our clients. We have a reputation of focusing on delivery and being easy to work with, placing the utmost priority on your success.

The Table below presents a partial list of our clients:

CSG Government Solutions – Sample Client List	
Iowa Medicaid Enterprise	Iowa Department of Human Services
Florida Agency for Health Care Administration	Centers for Medicare & Medicaid Services (CMS)
Illinois Department of Human Services	Indiana Family and Social Services Administration
Georgia Department of Community Health	Ohio Department of Job & Family Services
Georgia Department of Public Health	Northern Arizona Regional Behavioral Health Authority
Oregon Department of Human Services	Oklahoma Department of Human Services
Department of Vermont Health Access	New Mexico Department of Human Services
Illinois Department of Insurance	Iowa Workforce Development
Illinois Department on Aging	New Mexico Department of Labor
Illinois Office of Health Information Technology	Tennessee Department of Labor and Workforce Dev.
CIGNA Government Services	Job Service North Dakota
Michigan Unemployment Insurance Agency	Kansas Division of Motor Vehicles

Experienced Consulting Staff

Our staff members are highly experienced Technology and Management Consultants, many with more than twenty years of experience in Information Technology and consulting. Seventy-five percent of our consultants have at least ten years of experience. Our technical consultants have certifications in mainstream technologies from Microsoft, IBM, Cisco, Sun and others. This assures that our team will bring a wide variety of experience and expertise to the projects associated with this contract.

Client Survey Ranks CSG

Although many firms believe they provide excellent service, CSG has unbiased proof. The U.S. General Services Administration commissioned Dun & Bradstreet to conduct a random survey of our clients to assess our ability to deliver our services as represented in our proposals. The clients rated CSG on a scale of 1 to 100.

Category	Description	Rating
RELIABILITY	How reliably do you think this company follows through on its commitments?	94
COST	How closely did your final total costs correspond to your expectations at the beginning of the transaction?	92
DELIVERY/TIMELINESS	How satisfied do you feel about the timeliness of the product/service delivery?	95
QUALITY	How satisfied do you feel about the quality of the product/service offered by this company?	96
BUSINESS RELATIONS	How easy do you think this company is to do business with?	95
PERSONNEL	How satisfied do you feel about the attitude, courtesy, and professionalism of this company's staff?	97
CUSTOMER SUPPORT	How satisfied do you feel about the customer support you received from this company?	95
RESPONSIVENESS	How responsive do you think this company was to information requests, issues, or problems that arose in the course of the transaction?	95
SUMMARY PERFORMANCE	Indicative of likely overall performance	93

3.2.5.1 CSG Experience

CSG Government Solutions has a longstanding history of quality delivery across multiple clients, including multi-year contracts representing significant levels of effort. Our commitment to properly staffing and maintaining the appropriate team members extends to each CSG project, including the Quality Assurance and Quality Control (QA/QC) Services for Iowa's MMIS Implementation Project. Our firm has the capacity to meet the staffing demands for this important project.

Since 1997, CSG has provided outstanding support for state government agencies as they tackle complex business and technical improvement projects. We support the full project life cycle and have deep and proven technical experience as an independent quality control agent, including gap analysis identification, remediation planning, work plan development, procurement assistance, Quality Assurance (QA), and Independent Verification and Validation (IV&V). CSG is a market and thought leader in Project Management, Quality Assurance/Quality Control, and Software Testing & Independent Verification services, with an unrivaled commitment to customer success.

CSG's Quality Assurance and Quality Control proficiency includes project and architecture analysis and reviews, validating and verifying implementation project requirements, software testing, quality control, certification testing, and productivity audits. Our IV&V/QA processes support IEEE 1012-2004, use industry best practices and standard toolsets, and are integrated with our CSG REALizeSM methodology. Each IV&V/QA engagement is customized to the unique needs of the client and the project, using CSG REALizeSM as the framework and guide for work activities and overall quality management.

CSG Government Solutions has over fourteen (14) years of experience providing the types of services specified in the RFP. CSG is a recognized Healthcare and Human Services industry thought leader, providing subject matter expertise in the ever-changing government and healthcare and human services landscape. Now more than ever the landscapes of human services, Medicaid, and the healthcare industry are changing rapidly. With rapid change comes great opportunity for progress, but also for confusion and misunderstanding. Our expertise is evidenced by the fact that CSG is currently under contract with the Centers for Medicare & Medicaid Services (CMS) to provide Project Management and Subject Matter Expertise to further evolve the Medicaid Information Technology Architecture (MITA) Framework to v3.0. In addition to MITA, CSG also keeps a finger on the pulse of other continuing developments including the CMS MMIS Certification Toolkit and requirements, the American Recovery and Reinvestment Act (ARRA), Health Information Exchange (HIE), and Health Insurance Exchange (HIX) among many others.

The following pages describe how CSG's expertise is represented across the larger Healthcare and Human Services industry.

CSG Industry Thought Leadership and Participation

CSG Government Solutions has a reputation for providing thought leadership to the Medicaid and health care industries through participation in multi-stakeholder collaborative groups. Our corporate commitment to these activities ensures DHS that our team is engaged with several industry workgroups,

The CSG Team has the experience and qualifications to successfully complete the Quality Assurance and Quality Control Services Project for the State of Iowa.

- The CSG Team brings a wealth of experience with IME, other critical Medicaid, Healthcare, and Human Services projects, as well as MITA SS-A experience to this important project
- Key members of our team have direct QA/QC experience over similar large scale, MMIS implementation efforts
- CSG has over 14 years of experience providing the types of services requested in the RFP

committees, and organizations. The following list contains an example of the on-going commitments of CSG team members:

Organization	CSG Industry Participation
CMS Advisory Group: Private Sector Technical Group (PSTG)	<ul style="list-style-type: none"> ➤ President, Board Member ➤ Technical Architecture Committee (TAC) member
National Medicaid EDI Healthcare (NMEH) Workgroup	<ul style="list-style-type: none"> ➤ Medicaid Information Technology Architecture (MITA) SWG Co-Chair ➤ Operating Rules Co-Chair ➤ Health Insurance Exchange (HIX) / Eligibility Modernization Co-Chair ➤ Sub-workgroup Member
Health Level 7 (HL7)	<ul style="list-style-type: none"> ➤ HL7 Corporate Member ➤ MITA Project Participant
Workgroup for Electronic Data Interchange (WEDI)	<ul style="list-style-type: none"> ➤ Strategic National Implementation Process (SNIP) Steering Committee Member ➤ Timeline, Implementation, Education, Code Sets and Testing Committee Members ➤ ICD-10 Education Sub-workgroup Lead
ANSI ASC X12	<ul style="list-style-type: none"> ➤ X12N (Insurance/HIPAA) Member
National Council for Prescription Drug Programs (NCPDP)	<ul style="list-style-type: none"> ➤ Participant
Human Services IT Advisory Group (HSITAG)	<ul style="list-style-type: none"> ➤ Participant
Stewards of Change	<ul style="list-style-type: none"> ➤ Participant
National Child Support Enforcement Association (NCSEA)	<ul style="list-style-type: none"> ➤ Co-Chair for the 2012 Mid-Year Policy Forum ➤ Finance Committee Member ➤ Audit Committee Member
Eastern Regional Child Support Association (ERICSA)	<ul style="list-style-type: none"> ➤ Conference Planning Committee Member
NHIN CONNECT	<ul style="list-style-type: none"> ➤ Code-a-Thon Participants
Annual MMIS Conference	<ul style="list-style-type: none"> ➤ Planning Coordinator
Project Management Institute	<ul style="list-style-type: none"> ➤ Corporate Member

Table 1: CSG Industry Leadership and Participation – CSG is a health care and Medicaid thought leader and participates in a variety of in multi-stakeholder collaborative groups.



Our industry participation provides us the opportunity to partner with many state staff, including those from IME, to support Medicaid needs in standards development. Participating also gives our team members the chance to understand the complications of Medicaid at a deeper level, supporting the advancement of technology and the use of standards to improve overall administration of the Medicaid Programs nationwide.

Our team members have regular communication with the CMS and are on the forefront of developing, understanding, and implementing the various changes from CMS to the states in the form of MITA and the updated MECT. Collectively, this provides IME access to innovative information for Medicaid and the health care industry, all designed to support you in achieving your objectives.

CSG presented sixteen different sessions at the **2011 MMIS conference** including:

- Six MITA related sessions, three of which are dedicated to MITA Framework 3.0, one focusing on Cloud Computing a key component in the evolution of the MITA Framework, and two real-world discussions
- Five Operations sessions, three discussing system procurement options and tools, one focusing on IV&V and another related to managing multiple initiatives
- Three Standards related sessions focused on ICD-10 and 5010
- Two Legislative and Health Care Initiative sessions

For the **2011 MMIS Conference**, CSG presented the following sessions:

Subject	Title	Speakers/Moderators
Standards	ICD-10: Headline News	➤ Andrea Danes ➤ Gary Kuhn
ACA	Health Insurance Exchange and Eligibility Automation: Strategies for Success	➤ Deneen Omer
MITA	Real World MITA: Integration with Coexisting Architectures	➤ Dale Posont
Operations	Case Study: Feasibility of Multi-State System Procurement	➤ Connie Carter ➤ Jim Mahony
Operations	The Roadmap to Success: Using the Right Tool at the Right Time to Achieve Strategic and Compliance Objectives	➤ Patti Garofalo
HIT/HIE/ARRA/HITECH	Tools: How to Manage ACA, HITECH, and Eligibility Deadlines	➤ Janelle McDonald
Operations	IV&V / QA: Checks and Balances for Medicaid Projects	➤ Bob Guenther ➤ Deneen Omer

Subject	Title	Speakers/Moderators
Operations	Managing Multiple Initiatives through Portfolio Management: Doing the Right Projects and Doing Projects Right	<ul style="list-style-type: none"> ➤ Andrea Danes ➤ Deneen Omer
Standards	Comprehensive 5010 Testing	<ul style="list-style-type: none"> ➤ Gary Kuhn
Operations	Into the Cloud: A Strategic Vision for Integrating Health and Human Services Technology	<ul style="list-style-type: none"> ➤ Dale Posont
Standards	ICD-10: Navigating the Challenges	<ul style="list-style-type: none"> ➤ Gary Kuhn ➤ John Rago
MITA	MITA 3.0	<ul style="list-style-type: none"> ➤ Andrea Danes
MITA	CMS MITA Artifact Stakeholder Review Orientation	<ul style="list-style-type: none"> ➤ Bob Guenther ➤ Shaun Loughney ➤ Dale Posont
MITA	MITA SS-A as it Relates to APDs	<ul style="list-style-type: none"> ➤ Patti Garofalo ➤ Bob Guenther ➤ Shaun Loughney ➤ Janelle McDonald
Operations	Best Practices for successful MMIS Implementation – from Project Initiation to Certification	<ul style="list-style-type: none"> ➤ Deneen Omer
Operations	Training That Works	<ul style="list-style-type: none"> ➤ Bill Schuh ➤ Renea Steele

Table 2: CSG’s 2011 MMIS Conference Sessions – CSG has a reputation for providing thought leadership to the Medicaid and health care industries as evidenced by our participation in the 2011 MMIS Conference.

The following pages provide a description of all services similar to those sought by the RFP that CSG has provided to other governmental entities within the last 24 months, as well as a description of all contracts and projects currently undertaken by CSG.



Experience within the Last 24 Months

CSG has provided services similar to those sought by the Iowa QA/QC Services for the MMIS Implementation Project RFP. The following matrix includes descriptions of the services CSG has provides to State government agencies within the last 24 months.



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Current CSG Contracts and Projects

The following matrix describes all contracts and projects of similar services currently undertaken by CSG in addition to the projects listed above in *Section 5.1.1, Experience within the Last 24 Months*. Descriptions provided in *Section 5.1.1* are not repeated in the matrix below.



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Experience Managing Subcontractors

CSG is not proposing the use of subcontractors to complete the scope of work described in the Quality Assurance and Quality Control Services for the Iowa MMIS Implementation Project RFP.

Letters of Reference

CSG is proud of our reputation for customer satisfaction and our focus on delivering results. As required by the RFP, three letters of reference from our clients where we have performed similar services to those sought by the RFP are provided on the following pages.



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3.2.5.2 Personnel

The CSG Team understands that the foundation for success in every project is the people involved in the project. We have carefully considered your requirements to determine which of our resources best suit your goals, and have assembled a team of experienced professionals with deep subject matter expertise in the management, oversight, quality assurance and quality control of large, complex computer systems, such as Iowa's MMIS. Our key personnel have significant Medicaid, MITA, and MMIS implementation experience, superb analytical capabilities, extensive project management knowledge and expertise, and a deep understanding of quality assurance and quality control methodologies. Our team members have comprehensive experience successfully overseeing and managing State government projects of a similar size and scope, with similar timelines, complexities, and interdependencies.

Our approach to organizing the QA/QC Project includes a dedicated project manager to provide day-to-day oversight and coordination of activities of our project team. A Lead Quality Assurance / Quality Control Analyst will coordinate the work of our QA Analyst teams to quickly assess, evaluate, and oversee the work of the Systems Services Implementation Project Vendors. Key aspects of our project team organizational structure, as illustrated below in *Section 3.2.5.2.1, Tables of Organization*, allow us to operate effectively and efficiently. Our key team members are 100% dedicated to this project and will be on site in Des Moines for the duration of the project.

We have assigned our staff to the following roles for the Quality Assurance and Quality Control Services for the Iowa MMIS Implementation Project.

Project Advisory Team

- **Client Executive** – Patti Garofalo is the CSG Client Executive for this engagement. In this role, Patti will serve as liaison with CSG and the State of Iowa for any contractual matters to ensure that the QA/QC Project is running smoothly and that we are meeting all expectations. In addition, Patti will be a key Project Advisor for the team. Patti's expertise in the industry enables her to be uniquely positioned to provide this oversight and assistance to the QA/QC Project.
- **Project Advisors** – Andrea Danes and Bob Guenther, executive level Subject Matter Experts, provide advisory services to our team throughout the project life cycle. They focus on assisting our team with the various project activities, and bring extensive knowledge of State Medicaid programs.

Project Team

- **Project Manager** – Colleen May will provide day-to-day oversight and coordination of activities of our project team. She is dedicated full-time to the successful completion of the QA/QC Project and will work directly with IME contractors and Agency staff and contractors. She has the authority to revise processes or procedures and assign additional resources, as needed, to maximize the efficiency and effectiveness of the services required under the resulting contract.

CSG proposes a highly knowledgeable team with extensive experience in providing quality assurance and quality control services to state agencies procuring new MMIS systems.

- We have assembled a team of experienced professionals with deep knowledge of industry standards and best practices in the QA/QC of large-scale and enterprise-level projects
- Our key personnel have significant Medicaid, MITA, and MMIS implementation experience, superb analytical capabilities, extensive project management knowledge and expertise, and a deep understanding of quality assurance and quality control methodologies
- CSG has a long history of collaboration with our clients, including IME

Colleen is currently serving as Lead Quality Assurance Analyst on the IME HIPAA Transition Project where she is working closely with IME to perform a detailed gap analysis across all business processes, procedures, systems, and interfaces for the IME's conversion to the updated HIPAA 5010 transactions, NCPDP transactions and ICD-10 Code Set Standards. Colleen's experience with IME and her ability to leverage existing PMO and QA/QC processes, artifacts, and tools for the MMIS Implementation Project QA/QC is a key enabler of our team being productive on day one of the project. Should CSG be awarded the QA/QC Services Project for the Iowa MMIS Implementation Project, we will work closely with IME to manage the transition so that there is no impact on the HIPAA Transition Project. It is our intent to promote an existing HIPAA project team member to fill Colleen's role in order to maintain continuity and minimize transition time. CSG will not replace any staff members without prior written IME approval.

- **Lead QA/QC Analyst** – Janelle McDonald is a Senior Analyst and Medicaid SME responsible for developing and establishing quality assurance standards and measures and leads the Quality Assurance / Quality Control Team activities. She ensures integration of the QA/QC services into the MMIS DDI processes so that the transition to operations and CMS certification will be successful. Janelle also assists the Agency and our project team with all testing requirements related to the breadth and scope of replacing the MMIS and POS systems, including assessing and analyzing the integration of these systems into the IME environment. Janelle applies her proven analytical and problem-solving skills to help validate processes in order to minimize risks and issues during implementation.
- **Lead Analyst** – Shaun Loughney is a MITA and Medicaid Subject Matter Expert responsible for representing the MITA SS-A perspective during the project and leads a team of business and technical analysts through the State Self-Assessment process. She applies a broad and in-depth knowledge of MITA, MMIS, and Medicaid business and technical processes to support the project team completing the Iowa SS-A. Shaun has direct experience in the development of the MITA Framework 3.0 enhancements, which includes the writing of Business Architecture artifacts to accommodate current Health Care Reform initiatives such as ACA and HITECH.
- **QA/QC Analysts** – Responsible for the project quality assurance and quality control activities including CMS preparation, meetings, and records management activities. These resources work at the direction of the Lead QA/QC Analyst and Project Manager to assess and analyze the implementation of IME's new MMIS and POS system, and help define and implement quality standards for all deliverables and test plans. These team members also check the completeness of all deliverables and all tests results.
- **Business Analysts** – Experienced with various Medicaid and other government programs and systems, and brings a functional understanding of the MMIS program goals, constraints, impacts, and challenges. Leads business and functional requirements gathering and management, and have a broad experience with government information technology systems and business analysis, design, development, and implementation. These resources work at the direction of the Lead Analyst and Project Manager to complete the Iowa State Self-Assessment.
- **Technical Analysts** – Experienced with various Medicaid or other government programs and systems, and brings a technical understanding of the MMIS program goals, constraints, impacts, and challenges. These are experienced consultants with expertise in systems analysis, design, development and implementation.

Key Management Augmentation Team

- **Testing Manager** – Steve Usher oversees the quality and completeness of all testing activities conducted by all contractors including the Quality Assurance/Quality Control contractor. Steve brings proven Medicaid, SOA and MITA experience to this critical role, including a strong understanding of testing and automation technologies. He is well-suited to provide implementation testing oversight and guidance to the Agency and DDI Vendors.

CSG affirms that Steve is 100 percent dedicated to the Iowa Medicaid project, holds no other position within the scope of RFP MED-12-014, and reports directly to the State’s MMIS Project Director.

- **Risk Manager** – Maggie Siegmund oversees identification and mitigation of all risks identified by contractors. She will ensure that risks are escalated to the appropriate decision makers within the agency to allow appropriate mitigation of those risks. Maggie is uniquely positioned to fill this role and brings extensive knowledge and experience in the healthcare industry. She has over 10 years of experience with MMIS implementations in nine states.

CSG affirms that Maggie is 100 percent dedicated to the Iowa Medicaid project, holds no other position within the scope of RFP MED-12-014, and reports directly to the State’s MMIS Project Director.

- **Technical Manager** – Darren Steiner oversees all technical details of the systems’ implementation. Darren has experience in similar roles throughout his 25 year career, including recent experience supporting the IME’s HIPAA Transition Project. As a senior Medicaid SME, he has direct experience managing teams assessing and analyzing the technical capabilities and requirements for the implementation of MMIS systems of similar size and complexity.

Darren is currently serving as HIPAA Standards Expert on the IME HIPAA Transition Project where he is working closely with IME to perform a detailed gap analysis across all business processes, procedures, systems, and interfaces for the IME’s conversion to the updated HIPAA 5010 transactions, NCPDP transactions and ICD-10 Code Set Standards. Should CSG be awarded the QA/QC Services Project for the Iowa MMIS Implementation Project, we will work closely with IME to manage the transition so that there is no impact on the HIPAA Transition Project. It is our intent to promote an existing HIPAA project team member to fill Darren’s role in order to maintain continuity and minimize transition time. CSG will not replace any staff members without prior written IME approval.

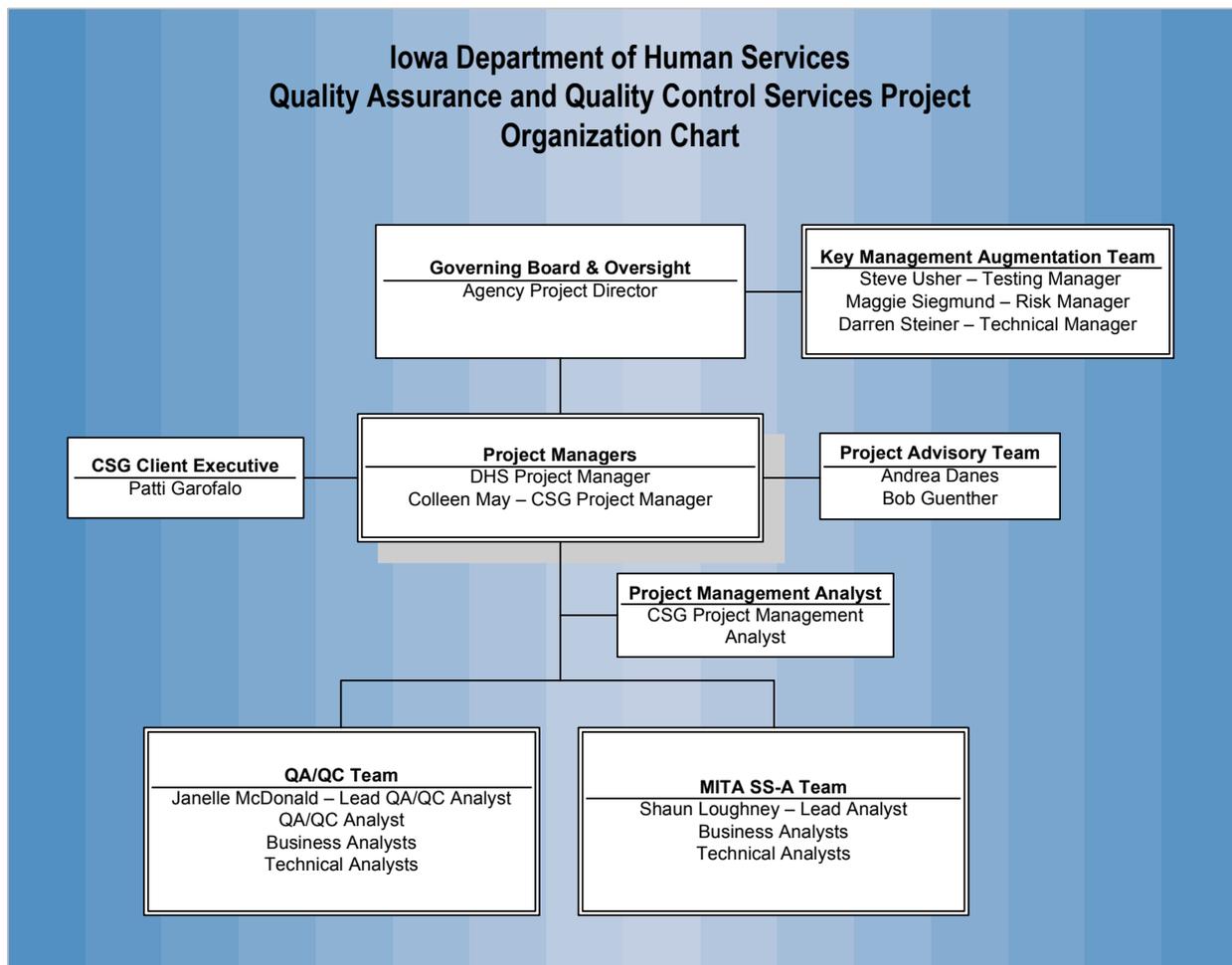
CSG affirms that Darren is 100 percent dedicated to the Iowa Medicaid project, holds no other position within the scope of RFP MED-12-014, and reports directly to the State’s MMIS Project Director.

3.2.5.2.1 Tables of Organization

The CSG Team is comprised of experienced professionals with deep knowledge of industry standards and best practices regarding the oversight, quality assurance, and quality control of large-scale and enterprise-level projects, including procurement, installation, evaluation, operations and maintenance of enterprise systems, to assist the State of Iowa with achieving your goals. Our key personnel have significant information technology consulting experience.

Following is our proposed Project Organization Chart for our QA/QC Services for Iowa’s MMIS Implementation Project. This serves as a starting point and we work closely with the Agency Project Director and Executive teams to finalize project organization early in the project. Our unified team consists of our partners and the IME. We developed the project organization chart using the following guiding principles:

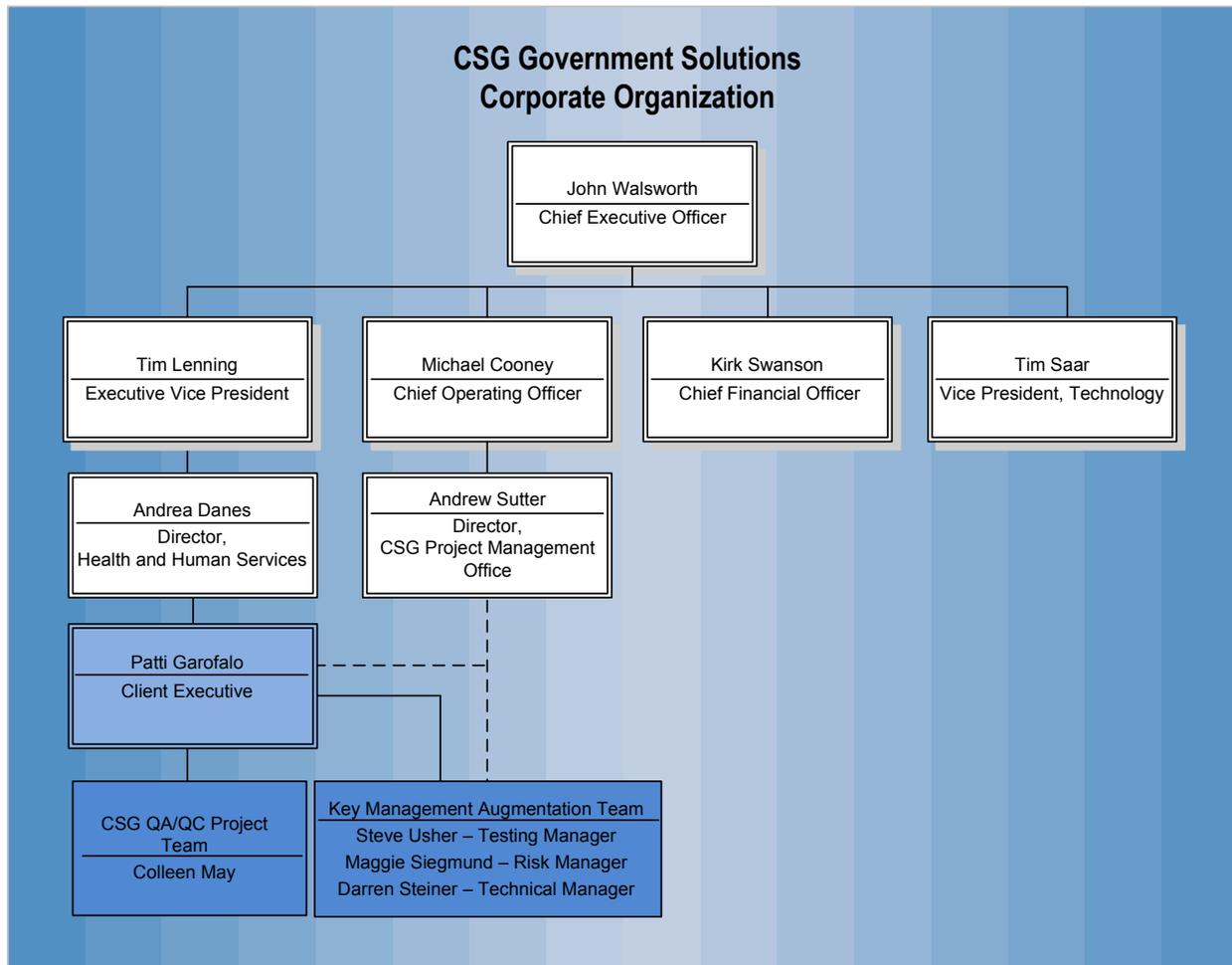
- Define clear roles and responsibilities for our team including the IME
- Leverage National Medicaid experience and deep technology expertise
- Provide clear lines of reporting and authority for decision-making
- Create an effective project team oversight structure



CSG understands that this is a critical initiative for the State of Iowa – it represents a significant effort involving multiple stakeholders, state agencies, and a number of different Vendors. We also understand Iowa’s unique, modular Medicaid business model and have **experience working directly with the IME on the Health Insurance Portability and Accountability Act (HIPAA) 5010, NCPDP and ICD-10 Code Sets Initiative**. Because of CSG’s corporate experience, our Executive Management team is well versed on the intricacies of your organizational structure and is able and available to provide support to both the IME and our project team.

As shown in the above Project Organization Chart, our project manager, Colleen May, is supported directly by our Client Executive, Patti Garofalo, regarding quality, staffing, or other issues that need to be addressed or escalated. CSG’s Client Executives have direct access to CSG’s Executive Management team for addressing any issues that require the highest level of escalation. We have an established project management office that supports our Client Executives and Project Managers directly. We also conduct weekly operations meetings to assess the staffing needs and address any issues or risks of our ongoing engagements.

The following diagram illustrates our Corporate Organization Chart, detailing how this project aligns with CSG’s overall operations.



3.2.5.2.2 Names and Credentials of Personnel

Following is a list of the key team members and project staff assigned to this critical initiative for the State of Iowa. Our key team members are 100% dedicated to this project and will be on site in Des Moines for the duration of the project. Please see *Section 3.2.5.2.3, Project Manager and Key Personnel*, on the following page for detailed information regarding each team members' experience and credentials.

Project Advisory Team

- **Client Executive:** Patti Garofalo
- **Project Advisor:** Bob Guenther
- **Project Advisor:** Andrea Danes

Key Management Augmentation Team

- **Testing Manager:** Steve Usher
- **Risk Manager:** Maggie Siegmund
- **Technical Manager:** Darren Steiner

Key Project Personnel

- **Project Manager:** Colleen May

Project Staff

- **Lead QA/QC Analyst:** Janelle McDonald
- **Lead Analyst:** Shaun Loughney
- **Technical Analyst:** Ernie Saxman



3.2.5.2.3 Project Manager and Key Project Personnel

The CSG Team

Project Advisory Team



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Key Management Augmentation Team





Key Project Personnel



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Detailed Resumes

Detailed resumes for the CSG Team key personnel and project staff, including full name, educational background, years' of experience, and employment history are provided on the following pages.

Project Advisory Team

- **Patti Garofalo** – Client Executive
- **Bob Guenther** – Project Advisor
- **Andrea Danes** – Project Advisor

Key Management Augmentation Team

- **Steve Usher** – Testing Manager
- **Maggie Siegmund** – Risk Manager
- **Darren Steiner** – Technical Manager

Key Project Personnel

- **Colleen May** – Project Manager

Project Staff

- **Janelle McDonald** – Lead QA/QC Analyst
- **Shaun Loughney** – Lead Analyst
- **Ernie Saxman** – Technical Analyst



Project Advisory Team

Patti Garofalo – Client Executive













Bob Guenther – Project Advisor



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Andrea Danes – Project Advisor



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Key Management Augmentation Team

Steve Usher – Testing Manager



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Maggie Siegmund – Risk Manager





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Darren Steiner – Technical Manager









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Key Project Personnel

Colleen May – Project Manager











Project Staff

Janelle McDonald – Lead QA/QC Analyst















Shaun Loughney – Lead Analyst





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Ernie Saxman – Technical Analyst







3.2.5.3 Financial Statements

CSG audited financial statements from the last three years (i.e., 2008 – 2010) are provided on the following pages. These financial statements are confidential, and we invoke the Trade Secret exemption defined in Iowa Code, Chapter 22.7.



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3.2.5.4 Termination, Litigation, and Investigation

CSG provides the following statements in response to RFP Section 3.2.5.4, Termination, Litigation, and Investigation.

List any contract for services that the bidder has had that was terminated for convenience, non-performance, non-allocation of funds, or any other reason for which termination occurred before completion of all obligations under the contract provisions.

CSG has not had any contracts terminated for convenience, non-performance, non-allocation of funds, or any other reason for which termination occurred before completion of all obligations under the contract provisions.

List any occurrences where the bidder has either been subject to default or has received notice of default or failure to perform on a contract. Provide full details related to the default or notice of default including the other party's name, address, and telephone number.

CSG has not been subject to default, nor have we received notice of default or failure to perform on any contract.

List any damages, penalties, disincentives assessed, or payments withheld, or anything of value traded or given up by the bidder under any of its existing or past contracts as it relates to services performed that are similar to the services contemplated by this RFP. Include the estimated cost of that incident to the bidder with the details of the occurrence.

CSG has not had any existing or past contracts where damages, penalties, disincentives assessed, or payments withheld, or anything of value traded or given up by CSG.

List and summarize pending or threatened litigation, administrative or regulatory proceedings, or similar matters related to the subject matter of the services sought in this RFP.

CSG has no pending or threatened litigation, administrative or regulatory proceedings, or similar matters to disclose related to the subject matter of the services sought in this RFP.

List any irregularities that have been discovered in any of the accounts maintained by the bidder on behalf of others. Describe the circumstances of irregularities or variances and detail how the issues were resolved.

CSG has no irregularities to disclose that have been discovered in any of the accounts maintained by the CSG on behalf of others.

List any details of whether the bidder or any owners, officers, primary partners, staff providing services or any owners, officers, primary partners, or staff providing services of any subcontractor who may be involved with providing the services sought in this RFP, have ever had a founded child or dependent adult abuse report, or been convicted of a felony.

Neither CSG, nor any owners, officers, primary partners, staff providing services or any owners, officers, primary partners, or staff providing services of any subcontractor who may be involved with providing the services sought in this RFP have ever had a founded child or dependent adult abuse report, nor been convicted of a felony.



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APPENDIX A – METHODOLOGIES

A.1 CSG REALizeSM Project Management Methodology





























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**Quality Assurance and Quality Control (QA/QC) Services for
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A.2 CSG REALizeSM Quality Management Methodology



**Quality Assurance and Quality Control (QA/QC) Services for
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