

<b>STATE OF NORTH CAROLINA</b>  <b>Department of Health and Human Services</b> <b>Division of Health Benefits</b>	<b>REQUEST FOR INFORMATION NO. 30-2025-050-DHB</b>	
	Issue Date: November 19, 2025	
	Due Date: December 29, 2025	
<b>Refer <u>ALL</u> Inquiries regarding this RFI to:</b>  Iris Cooper Iris.Cooper@dhhs.nc.gov	Commodity Number: 801016	
	Description: Project/Program Management Support Services	
	Using Agency: NC Department of Health and Human Services, Division of Health Benefits	

This Request for Information (“RFI”) is available electronically on the North Carolina electronic Vendor Portal (“NC eVP”) at <https://evp.nc.gov/>.

**The purpose of this RFI is to survey the market for information requested herein and not to award a contract. Submission of a response does not create an offer, and no award will result by submitting a response.**

The State recognizes that considerable effort may be required in preparing a response to this RFI. However, the Respondent shall bear all costs for preparing and submitting a response. Information obtained through this RFI process may be used to develop a future solicitation.

Responses to this RFI will be received until 2:00 p.m. EST, DATE.

**EXECUTION**

RESPONDENT NAME:	E-MAIL:	
STREET ADDRESS:	P.O. BOX:	ZIP:
CITY & STATE:	TELEPHONE NUMBER:	TOLL FREE TEL. NO:
TYPE OR PRINT NAME & TITLE OF PERSON SIGNING:	FAX NUMBER:	
AUTHORIZED SIGNATURE:	DATE:	

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## **SECTION I. RESPONDENT QUESTIONS, RESPONSE INSTRUCTIONS, AND CONFIDENTIALITY**

### **A. Anticipated Schedule**

The Department Contract Specialist will make every effort to adhere to the following schedule.

<b>Action</b>	<b>Responsibility</b>	<b>Date</b>	<b>Time (EST)</b>
RFI Issued	Department	19Nov 2025	
Responses Due	Respondent(s)	29 Dec 2025	2:00 pm

Table 1 – Anticipated Schedule

### **B. Instructions for Developing Responses**

When developing Responses to this RFI, the Respondent should consider the following:

1. Read and carefully review all Sections of this RFI.
2. Prepare responses in a straightforward and detailed manner. Responses are to be submitted to the Department according to the instructions found on the cover page of the RFI and this Section II.
3. Complete the Execution section on Page 1 of this RFI and number the pages in the responses.
4. Clearly identify the specific question, section, and subsection number(s) or other identifier that corresponds with each response. This allows the Department to clearly understand the specific questions or items addressed. To the extent possible within each section of the response, the items should be addressed in the order in which they appear in the RFI.
5. Provide detailed information in a format that may include a narrative, exhibits, charts, tables or other artifacts that support the response.
6. Responses to all questions and items within the RFI are encouraged but there is no obligation to do so.
7. The Department reserves the right to contact any Respondent and request additional information. Include the contact information for the individual(s) best suited to engage with the Department.

### **C. Instructions for Submitting Responses**

1. Respondent must submit its response to this RFI via the Ariba Sourcing Tool by the specified time and date provided in the Anticipated Schedule.
2. When submitting a response, include all pages of the RFI, a completed and signed EXECUTION Section on page 1, and responses to the requested information contained in Section IV.
3. The following copies are required to be provided to the Department in response to this RFI:
  - a. One (1) electronic copy of the signed, completed response identified as **RFI #30-2025-050-DHB - Respondent's Name**.
  - b. One (1) electronic copy of a redacted response in accordance with Chapter 132 of the North Carolina General Statutes, the Public Records Act, identified as **RFI #30-2025-050-DHB - Respondent's Name - Redacted**. For the purposes of this RFI, redaction means to edit a document by obscuring or removing information that is considered confidential and/or proprietary by the Respondent and that meets the definition of Confidential Information set forth in G.S. 132-1.2. Any information removed by the Respondent should be replaced with the word, "Redacted." If Respondent's response does not contain Confidential Information, the

Respondent must submit a signed statement to that effect identified as **RFI #30-2025-050-DHB - Respondent's Name - Statement of Confidential Information.**

4. The electronic copies of the response must not be password protected.
5. The electronic copies of the response must be in PDF format.

For training on how to use the Ariba Sourcing Tool to view solicitations, submit questions, develop responses, upload documents, and submit offers to the State, Respondents should go to the following site: <https://eprocurement.nc.gov/training/vendor-training>.

Questions or issues related to using the Ariba Sourcing Tool itself can be directed to the North Carolina eProcurement Help Desk at 888-211-7440, Option 2. Help Desk representatives are available Monday through Friday from 7:30 AM EST to 5:00 PM EST.

#### **D. Notice Regarding Confidentiality**

1. Per NCGS 132-1, et seq., information or documents provided to the Department in response to this RFI are Public Record and subject to inspection, copy and release to the public unless properly marked and exempt from disclosure by statute, including, but not limited to, NCGS § 132-1.2.
2. As provided for in the North Carolina Administrative Code (NCAC), including but not limited to 01 NCAC 05B .0103, 09 NCAC 06B .0103 and 09 NCAC 06B .0302, all information and documentation whether electronic, written or verbal relative to the development of a contractual document for a proposed procurement or contract shall be deemed confidential in nature. In accordance with these and other applicable rules and statutes, such material shall remain confidential until the award of a contract or until the need for procurement no longer exists. **Any proprietary or confidential information, which conforms to exclusions from public records as provided by NCGS § 132, must be clearly marked as such within each page containing the trade secret or confidential information, and identified in boldface as "CONFIDENTIAL."** If only a portion of each page marked "CONFIDENTIAL" contains trade secret information, the trade secret information shall be designated with a contrasting color or by a box around such information. In addition to marking confidential information as required by NCAC 05B.0103, confidential pages or portions of the response shall be reflected in the redacted copy identified as **RFI 30-2025-050-DHB - Respondent's Name – Redacted.** By submitting a redacted copy, the Respondent warrants that it has formed a good faith opinion, having received such necessary or proper review by counsel and other knowledgeable advisors that the portions marked confidential and redacted meet the requirements of NCGS §132. The Respondent must identify the legal grounds for asserting that the information is confidential, including the citation to state law.

## **SECTION II. RIGHTS AND OBLIGATIONS**

### **A. Rights to Submitted Material**

All responses, inquiries or correspondence relating to or in reference to this RFI, and all documentation submitted by the various Respondents shall become the property of the Department when received. Ideas, approaches, and options presented by Respondents may be used in whole or in part by the State in developing a future solicitation should the Department decide to proceed with a solicitation. Further, combinations of ideas from various Respondents may also become part of a solicitation, based on consideration of various RFI submissions and the needs of the Department, which may differ from any single Respondent's experience in other places.

## **B. Obligations of the State**

The Department may choose to issue a solicitation for the procurement of a solution. However, this RFI is not a guarantee that a solicitation will be issued for any or all of the services or systems referenced herein, about which ideas and approaches are being sought. As provided in Section I.E of this RFI, information submitted by Respondents for this RFI will remain confidential until after the award of any solicitation or until the State decides not to issue a solicitation.

## **SECTION III. PROJECT/PROGRAM MANAGEMENT SERVICES**

### **A. Background and Program Information**

The North Carolina Department of Health and Human Services (NCDHHS), Division of Health Benefits (DHB or Department), manages and administers state and federally funded programs that provide health coverage to eligible low-income individuals, families, and individuals with disabilities in North Carolina. Approximately 3 million individuals are covered under Medicaid in North Carolina. To manage this complex program, DHB encompasses broad Medicaid services, including coverage for medical services, pharmacy services, Behavioral Health and Intellectual/Developmental Disabilities (I/DD) services, and Long-Term Services and Supports (LTSS). Services are covered through a combination of managed care and fee for service delivery. DHB is seeking the support services of an experienced vendor who can provide broad assistance in the following areas:

- a) Program/Project Management Support
- b) Strategic Planning and Portfolio Management
- c) Strategic Communications and Administrative Support
- d) Configuration Control
- e) Policy and Program Governance
- f) Risk Management
- g) Management Advisory Services
- h) Requirements Management and Analysis
- i) Concept Development
- j) Data Management and Analysis

### **B. Purpose of the RFI**

The purpose of the RFI is to:

1. Solicit feedback from potential vendors with experience in providing comprehensive project and program management support services.
2. Obtain a rough order of magnitude estimate for the annual costs of supporting a program of the scope and size of NC Medicaid.
3. Obtain information related to the type and number of resources required to support a program of the scope and size of NC Medicaid.

4. Obtain information that may be used to develop a competitive solicitation to establish a qualified vendor pool to provide project/program management support services to DHB.

### C. Definitions and Acronyms

1. **24x7:** A statement of availability of systems, communications, and/or supporting resources every hour (24) of each day (7 days weekly) throughout every year for periods specified herein. Where reasonable downtime is accepted, it will be stated herein. Otherwise, 24x7 implies NO loss of availability of systems, communications, and/or supporting resources.
2. **Agency:** The term “Agency” within this RFP is referring to the North Carolina Department of Health and Human Services (NCDHHS). Synonymous with Department.
3. **BAA:** Business Associate Agreement, as that term is defined in the Health Insurance Portability and Accountability Act of 1996, as amended (“HIPAA”).
4. **Business Associate:** A person or organization, other than a member of a covered entity’s workforce, that performs certain functions or activities on behalf of, or provides certain services to, a covered entity that involve the use or disclosure of individually identifiable health information. Business associate functions or activities on behalf of a covered entity include claims processing, data analysis, utilization review, and billing (see 45 CFR 160.103).
5. **Business Day:** Business days mean Monday through Friday from 8:00 AM – 5:00 PM ET. State holidays are excluded. A list of North Carolina State Holidays is located at <https://oshr.nc.gov/state-employee-resources/benefits/leave/holidays>.
6. **Change Management Process:** Sequence of steps or activities that a change management team or project leader follow to apply change management to a change in order to drive individual transitions and ensure the project meets its intended outcomes.
7. **CMS:** The Centers for Medicare & Medicaid Services. This is the agency within the United States Department of Health and Human Services that administers the Medicare program and works in partnership with state governments to administer Medicaid, Children’s Health Insurance Program (CHIP), and health insurance portability standards.
8. **Communications Management Plan:** Policy-driven approach to providing stakeholders with information. The plan formally defines who should be given specific information, when that information should be delivered and what communication channels will be used to deliver the information.
9. **CM:** Configuration Management. A systems engineering process for establishing and maintaining consistency of a products performance, functional and physical attributes with its requirements, design, and operational information throughout its life.
10. **Department:** State of North Carolina Department of Health and Human Services, which is responsible for managing the delivery of health and human related services for all North Carolinians, especially its most vulnerable citizens, which includes children, elderly, people with disabilities, and low-income families. Includes the Division of Health Benefits. Synonymous with Agency.
11. **DHB:** Division of Health Benefits. The division within the NCDHHS responsible for implementing Medicaid transformation and administering the transformed Medicaid program.
12. **DHHS or NCDHHS:** The North Carolina Department of Health and Human Services. This department is responsible for managing the delivery of health and human related services for all North Carolinians, especially its most vulnerable citizens, which includes children, elderly, people with disabilities and low-income families. The Department works closely with health care professionals, community leaders and advocacy groups; local, state, and federal entities; and many other stakeholders. Synonymous with Agency and Department.

- 13. Document Management Plan:** Coordination and control of the flow (storage, retrieval, processing, printing, routing, and distribution) of electronic and paper documents in a secure and efficient manner, to ensure that they are accessible to authorized personnel as and when required.
- 14. HIPAA:** Health Insurance Portability and Accountability Act of 1996, as amended and its promulgating regulations.
- 15. Implementation Plan:** Detailed document that identifies all milestones and deliverables along with the methodology and sequencing that will be needed for a successful implementation. The Implementation Plan will also include known due dates, constraints or assumptions that will be necessary for detailed implementation planning and scheduling.
- 16. Implementation Schedule:** Comprehensive list of milestones, deliverables, and tasks along with the associated due dates, durations and resources required for implementation.
- 17. IV&V:** Independent Verification and Validation. A verification and validation organization that is technically, managerially, and financially independent of the State.
- 18. Key Personnel:** Any person performing under the Contract whose absence would cause an immediate and substantial risk to Vendor's ability to perform its obligation in the Contract as specified in the Vendor's offer.
- 19. LME/MCO: Local Management Entity/Managed Care Organization (LME/MCO):** Has the same meaning as LME/MCO as defined in N.C. Gen.Stat. §122C-3(20c).
- 20. Medicaid Program:** The joint federal-state health insurance program for low-income individuals and families who cannot afford health care costs. Medicaid serves low-income parents, children, seniors, and people with disabilities.
- 21. MES:** Medicaid Enterprise System is the current approach to Medicaid management systems that promotes the use of COTS and SaaS products along with modularity and a higher degree of interoperability among systems.
- 22. MES PMO:** Technology Program Management Organization comprised of the engineers, architects, specialist, analysts, project managers, program managers, and the Program Director for the MES project.
- 23. Monthly Status Report-**Please see Weekly Status Report definition. Monthly Status Report is a high-level summary produced at the end of every month as described in the Communications Plan.
- 24. NCAC:** North Carolina Administrative Code
- 25. NCDIT or DIT:** The NC Department of Information Technology, formerly Office of Information Technology Services.
- 26. NC eVP:** North Carolina electronic Vendor Portal - The State of North Carolina's on-line system for advertising solicitations, posting addendums, and publishing award notifications. Vendors can view and search for procurement opportunities <https://evp.nc.gov> .
- 27. NCFAS:** North Carolina Integrated eligibility system for public assistance services for Temporary Assistance for Needy Families (TANF), Medicaid, Child Care, Food and Nutrition Services (FNS)
- 28. NCID:** The standard identity management service that allows State, local, business and citizen users to achieve an elevated degree of security and real-time access control to the State's customer-based applications and information.
- 29. N.C.G.S.:** North Carolina General Statutes
- 30. PHI:** Protected Health Information, as that term is defined in HIPAA.

31. **PHP:** Prepaid Health Plan as defined in Session Law 2015-245, as amended and N.C.G.S. 108D-1(30).
32. **PMO:** Project Management Office responsible planning, organizing and delineating responsibility for the completion of an organizations' specific information technology (IT) goals.
33. **Program Management:** The process of managing several related projects.
34. **Provider:** The umbrella term used to refer to individual practitioners and facilities, entities, organizations, and atypical organizations or institutions.
35. **Requirements Management:** The process of documenting, analyzing, tracing, prioritizing, and agreeing on requirements and then controlling change and communicating to relevant stakeholders. It is a continuous process throughout a project.
36. **Beneficiary:** Person enrolled in a participating Medicaid program.
37. **RFP:** Request for Proposal is a formal, written solicitation document typically used for seeking competition and obtaining offers for more complex services or a combination of goods and services. The RFP is used when the value is over \$10,000. This document contains specifications of the RFP, instructions to bidders and the standard IT Terms and Conditions for Goods and Related Services.
38. **SMA:** State Medicaid agency. State agency responsible for the distribution of Medicaid benefits.
39. **State Contract Administrator:** A person who performs administrative functions related to dealing with contracts, like 1) request to bid, 2) evaluating bid, 3) allotment of contract, 4) Implementing contract, 5) measuring completed work, and 6) computing payments.
40. **Vendor:** Company, firm, corporation, partnership, individual, etc., submitting an offer in response to a solicitation.

#### D. Desired Outcomes

1. Strategic and Operational Outcomes
  - a. Improved alignment with state and federal policy and modernization goals (e.g., modularity, interoperability, and outcomes-based delivery).
  - b. Efficient and productive governance and accountability structures to support agile, cross-functional project teams.
  - c. Operational and technology ecosystem that fosters innovation, learning, and shared responsibility for outcomes.
2. Performance and Quality Outcomes
  - a. Defined and monitored performance metrics for each project phase or deliverable
  - b. Quality assurance and control frameworks embedded in project workflows<sup>1</sup>.
  - c. Continuous improvement mechanisms, including feedback loops and retrospective evaluations.
  - d. Risk mitigation strategies for scope creep, delays, or vendor underperformance.
3. Deliverables and Documentation Outcomes
  - a. Project Management Plans (e.g., Quality Management Plan, Communication Plan, Risk Management Plan)
  - b. Detailed implementation timelines with milestones and dependencies.
  - c. Defined roles and responsibilities across state agencies, vendors, and stakeholders.

4. Policy and Compliance Outcomes
  - a. Compliance with CMS requirements.
  - b. Support for health equity, accessibility, and member-centered design
  - c. Data privacy and security protocols in line with HIPAA and state laws.

## **SECTION IV. REQUESTED INFORMATION FROM RESPONDENT**

### **A. Content and Format**

The Department requests concise, detailed responses to the inquiries in Sections IV.B, IV.C, IV.D, and IV.E below. The response, in its entirety, shall be limited to ten (10) pages.

### **B. Information about Respondent**

1. Responses should provide an overview of the Respondent's company history, scope of services offered, and locations of operation. The response should describe the Respondent's experience providing support services similar in size and scope to those of NC Medicaid.
2. The response should provide the following:
  - a. Description of the Respondent's primary customer base or market, including other state Medicaid programs.
  - b. Description of relevant additional services offered by the Respondent.
  - c. Listing of states, agencies, or customers that utilize the Respondent's services that are similar to those required by this RFI. The response should include the state/agency name, types of services provided, contract start and end dates, description of scope of work, the duration of any contracts, and the termination dates.
  - d. Lessons learned from working with other customers in providing services of similar size, scope, and with requirements the same as, or similar to, those required by the Department.

### **C. Capability and Past Performance**

Respondents should provide detailed information regarding their experience with services provided in the following areas:

1. Business Requirements Management
2. Program Coordination and Integration
3. Issue and Risk Identification and Resolution
4. Budget Development and Coordination
5. Program Governance Management

### **D. Financial / Total Cost of Ownership**

1. Respondents are asked to provide information regarding estimated annual costs to procure the project/program management support services for an organization of similar size and scope as NC Medicaid. This information will help the Department understand acquisition and ongoing costs, and will be used to support budget development and funding requests.
2. Respondents are asked to provide a notional listing of labor categories and their respective functions needed to provide project/program management support as described in this RFI.

Labor Categories	Description/Function

Table 2 – Cost Items

3. If pricing information is limited or unavailable, describe the Respondent's preferred pricing model or structure, including unit costs based on key variables. Include any basis for estimates and the assumptions used to develop the costs.
4. Respondents will not be held to the pricing estimates provided in response to this RFI, should the Department decide to proceed with a competitive solicitation.