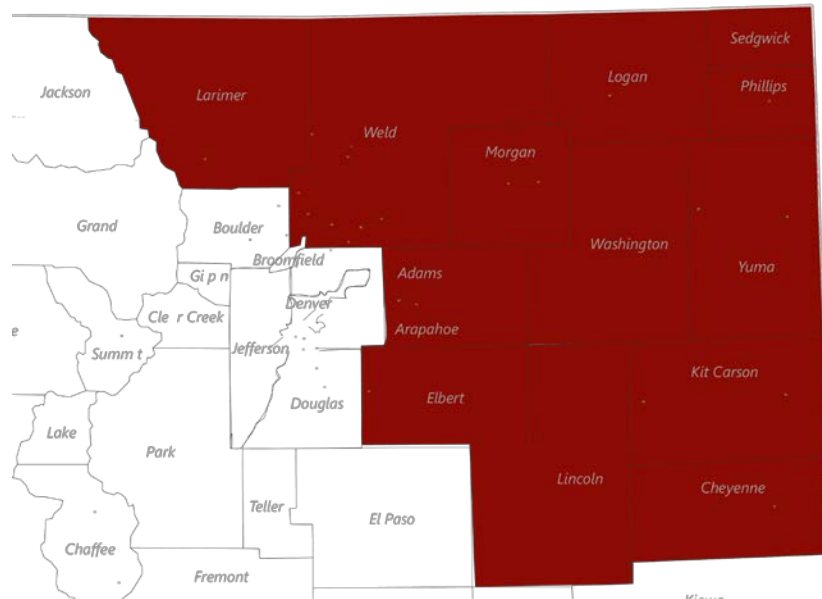


STATEMENT OF WORK

Connect for Health Colorado Health Coverage Guide Covering Northeast Colorado

Serving: NEECCO & Larimer County SBDCs

HEALTH COLORADO GUIDE - NORTHEAST COLORADO Covering NEECCO and Larimer County SBDCs



1. GENERAL DESCRIPTION

The Colorado Small Business Development Center Network is selecting a contract vendor to be certified as Health Coverage Guides, trained to provide assistance to small businesses in regards to the Colorado Health Benefit Exchange. The Colorado Small Business Development Center Network has been selected as an Assistance Site for the Connect for Health Colorado program. The assistance network is crucial to the Connect for Health Colorado's customer service experience and to the overall success of linking people to appropriate health coverage. The Health Coverage Guide will deliver education, outreach and in-person assistance with attention to the particular communication, cultural and linguistic needs of the population served. Training and certification will be provided by Connect for Health Colorado.

The role of the Health Coverage Guide is to provide current and prospective SBDC clients with fair and impartial information and services that help guide them through the application process. The Health Coverage Guide will provide education about all the health coverage options available to customers and the qualified health plans available on the Exchange, as well as information about tax credits and cost sharing subsidies. He or she will assist small businesses in completing the application for health coverage while providing outreach and training services for local SBDC centers. The Health Coverage Guide will ensure businesses know about their health plan options and will help them filter and sort those options. The Health Coverage Guide will also assist businesses with making changes to their account if necessary. He or she will connect customers to

the Customer Service Center, COHBE website or certified and licensed brokers if additional support or support beyond the scope of the Health Coverage Guide's role is needed.

Health Coverage Guides will be required to become certified through Connect for Health Colorado. Guides will need to complete and pass all assigned online training and attend one in-person training workshop. Total Connect for Health Colorado training is estimated to take 40 hours. Guides will also be required to become a Certified Business Consultant through the Colorado SBDC Network, if he or she is not already certified. It is estimated that certification through the SBDC will take approximately 8 hours.

It is estimated that Health Coverage Guides will meet one-on-one with clients and/or provide outreach and training for COHBE for approximately 10 hours a week, plus travel time. If grant funds are available, there may be the opportunity to provide additional consulting and outreach if necessary.

2. DEFINITIONS

2.1. CSBDC

"CSBDC" means the Colorado Small Business Development Center Network.

2.2. Lead Center

"Lead Center" means the Colorado Small Business Development Center Network Lead Center.

2.3. HCG

"HCG" means Health Coverage Guide.

2.4. COHBE or C4HCO

"COHBE" or "C4HCO" refers to the Colorado Health Benefit Exchange, or Connect for Health Colorado, a new health insurance marketplace for small businesses and individuals.

2.5. Client

A "Client" is a small business owner or employee who is receiving one-on-one assistance through the Colorado SBDC Network.

3. VENDOR'S OBLIGATIONS: After training and certification through the SBDC and COHBE, HCGs will be obligated to:

3.1. Provide Consulting:

- 3.1.1.** Provide individual consulting to small business owners and their employees related to COHBE
- 3.1.2.** Travel as needed and requested to SBDC centers in the region assigned to deliver one-on-one consulting assistance related to COHBE
- 3.1.3.** Deliver general education about COHBE to small business owners and their employees
- 3.1.4.** Meet with small business owners in person to explain HCG services, reasons to buy health insurance and options for coverage
- 3.1.5.** Assist small business owners with opening or accessing an account with COHBE
- 3.1.6.** Educate clients on insurance and health payment options in and outside of the Exchange, including Medicaid, CHP+, premium tax credits and cost sharing reductions, and Qualified Health Plans

- 3.1.7.** Translate insurance terms and concepts like the Essential Health Benefits into plain language for clients
- 3.1.8.** Explain provider networks and types of insurance plans available
- 3.1.9.** Effectively use the COHBE internet based system for assistance with client applications and assist clients with understanding web-based decision tools to help narrow the choices for qualified health plans
- 3.1.10.** Ensure small business owners know about their health option plans through the Exchange and help them filter and sort based on those options
- 3.1.11.** Encourage follow through, provide next steps and what to expect, and information customers when changes can or should be made
- 3.1.12.** Refer clients with appeals, grievances and complaints to the appropriate agency
- 3.1.13.** Make referrals as needed to the COHBE customer service center, certified brokers, or government and community resources as needed
- 3.1.14.** Explain to clients when life changes can be reported and when renewal will be needed
- 3.1.15.** Provide consulting in a manner that is culturally and linguistically relevant to the client
- 3.1.16.** Maintain expertise and certification about COHBE programs
- 3.1.17.** Accurately track and record activities for reporting to COHBE and the CSBDC
- 3.1.18.** Understand the needs of a small business owner related to business ownership and management
- 3.1.19.** Provide high quality and individually tailored assistance to clients

3.2. Provide Training & Outreach

- 3.2.1.** Present training workshops as needed to new and existing SBDC clients when requested by centers
- 3.2.2.** Serve as an advocate for COHBE and the CSBDC and actively promote the Exchange to drive small business owners to the CSBDC to access program assistance
- 3.2.3.** Work collaboratively with local SBDC staff, the state SBDC Lead Center, COHBE and organization partners as needed

3.3. Skills

- 3.3.1.** Proficiency using the internet and basic knowledge of MS Office and Excel
- 3.3.2.** Good interpersonal skills and the ability to work well with small business owners
- 3.3.3.** Basic knowledge of health insurance and health service delivery
- 3.3.4.** Ability to recognize cultural, language and learning differences
- 3.3.5.** Ability to explain and summarize detailed concepts in a one-on-one consulting session
- 3.3.6.** Experience working with small business owners in a one-on-one setting to provide objective education about public or private health programs
- 3.3.7.** Experience providing objective application and assistance

4. PERSONNEL

4.1. Responsible Administrator

The Vendor is hereby designated as the responsible administrator of this Contract.

4.2. Replacement

Vendor shall immediately notify the State if any Key Personnel cease to serve. Provided there is a good-faith reason for the change, if Vendor wishes to replace its Key Personnel, it shall notify the State and seek its approval. Such approval is at the State's sole discretion, as the State issued this

PO in part reliance on Vendor's representations regarding Key Personnel. Such notice shall specify why the change is necessary, who the proposed replacement is, what their qualifications are, and when the change would take effect. Anytime Key Personnel cease to serve, the State, in its sole discretion, may direct Vendor to suspend Work until such time as their replacements are approved. All notices sent under this subsection shall be sent in accordance with the Notices and Representatives provisions of this PO.

5. ACCEPTANCE CRITERIA

If services are not provided to CSBDC according to the Vendor's Obligations outlined in Section 3, the Vendor will not be paid. The Vendor will be providing the CSBDC monthly progress reports during project duration.

6. PAYMENTS

Payments shall be made in accordance with the provisions set forth in this purchase order are scheduled as follows:

The State, in consideration for services to be provided by Vendor during the term of this purchase order, shall pay the Vendor on a monthly basis for services provided.

The maximum amount payable under the terms and conditions of this PO shall not exceed \$52,100.00. Any amount in excess of this total must be agreed to by both parties and must be provided by a properly executed amendment to this purchase order.

HCGs will provide services on an as-needed basis. Consulting, training and outreach will be paid at the rate of \$50/hour, not to exceed 40 hours/month without prior written approval. Mileage will be reimbursed at \$.51/mile, not to exceed 1,900 miles/month without prior written approval. HCGs maybe be eligible for monthly phone, wireless internet hotspot and/or tablet internet reimbursements.

The Party performance under this purchase order shall commence when the purchase order is signed by the State Controller or delegated official. This purchase order shall terminate on December 31, 2014, unless sooner terminated or further extended by the State of Colorado.

7. ADMINISTRATIVE REQUIREMENTS

7.1. Accounting

- 7.1.1.** At all times from the Effective Date of this PO until completion of the Work, Vendor shall maintain properly segregated books of State PO Funds, matching funds, and other funds associated with the Work.
- 7.1.2.** All receipts and expenditures associated with the Work shall be documented in a detailed and specific manner, and shall accord with the Budget set forth herein.
- 7.1.3.** Vendor shall make and maintain accounting and financial books and records documenting its performance under the PO in a form consistent with good accounting practices.