

OEBB Pre-Implementation Workplan - November 8, 2007

ID	Task Name	Duration	Start	Finish	Predecessors	Responsibility	Completed
1	Overall Pre-Implementation Project	309 days	Thu 08/09/07	Tue 10/14/08			
2	Establish and Manage Project/Work Plan (3.1)	206 days	Thu 08/09/07	Thu 05/22/08		All	X
3	Review/summarize SB 426 requirements	1 day	Thu 08/09/07	Thu 08/09/07		All	X
4	Kickoff Meeting: August 9	1 day	Thu 08/09/07	Thu 08/09/07		All	X
5	Introductions	1 day	Thu 08/09/07	Thu 08/09/07		All	X
6	Review of project milestones	1 day	Thu 08/09/07	Thu 08/09/07		All	X
7	Discuss high-level program design/funding	1 day	Thu 08/09/07	Thu 08/09/07		All	X
8	Discuss workgroups	1 day	Thu 08/09/07	Thu 08/09/07		All	X
9	Board Meeting: August 23	1 day	Thu 08/23/07	Thu 08/23/07		All	X
10	Review/approve revised workplan	1 day	Thu 08/23/07	Thu 08/23/07		All	X
11	Discuss/form workgroups	1 day	Thu 08/23/07	Thu 08/23/07		All	X
12	Review self-insurance	1 day	Thu 08/23/07	Thu 08/23/07		All	X
13	Review stakeholders and communication needs	1 day	Thu 08/23/07	Thu 08/23/07		All	X
14	Review/approve approach for district info request	1 day	Thu 08/23/07	Thu 08/23/07		All	X
15	Board Meeting: September 13	1 day	Thu 09/13/07	Thu 09/13/07		All	X
16	Review options for comparability	1 day	Thu 09/13/07	Thu 09/13/07		All	X
17	Review instrument for surveying districts for plan and enrollment	1 day	Thu 09/13/07	Thu 09/13/07		All	X
18	Review high-level communication plan	1 day	Thu 09/13/07	Thu 09/13/07		All	X
19	Board Retreat: September 14	1 day	Fri 09/14/07	Fri 09/14/07		All	X
20	Team formation	1 day	Fri 09/14/07	Fri 09/14/07		All	X
21	Determine decision-making process	1 day	Fri 09/14/07	Fri 09/14/07		All	X
22	Board Meeting: September 27	1 day	Thu 09/27/07	Thu 09/27/07		All	X
23	Initial workgroup meetings	1 day	Thu 09/27/07	Thu 09/27/07		All	X
24	Approve approach to comparability	1 day	Thu 09/27/07	Thu 09/27/07		All	X
25	Workgroup updates as needed	1 day	Thu 09/27/07	Thu 09/27/07		All	X
26	Additional Workgroup meetings/teleconference calls	11 days	Thu 09/27/07	Thu 10/11/07		WG	X
27	Board Meeting: October 11	1 day	Thu 10/11/07	Thu 10/11/07		All	X
28	Review and discuss preliminary findings from district info request	1 day	Thu 10/11/07	Thu 10/11/07		All	X
29	Review preliminary plan design slate for 10/1/08	1 day	Thu 10/11/07	Thu 10/11/07		All	X
30	Review temporary rules on comparability	1 day	Thu 10/11/07	Thu 10/11/07		All	X
31	Workgroup updates	1 day	Thu 10/11/07	Thu 10/11/07		All	X
32	Board Meeting: October 25	1 day	Thu 10/25/07	Thu 10/25/07		All	X
33	Vote on temporary rules on comparability	1 day	Thu 10/25/07	Thu 10/25/07		All	X
34	Review plan design slate for 10/1/08	1 day	Thu 10/25/07	Thu 10/25/07		All	X
35	Workgroup updates	1 day	Thu 10/25/07	Thu 10/25/07		All	X
36	ADM: prelim recommendation on admin options	1 day	Thu 10/25/07	Thu 10/25/07			X
37	CCM: prelim recommendation on CCM strategic plan	1 day	Thu 10/25/07	Thu 10/25/07			X

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38	PD: prelim recommendation on plan design options	1 day	Thu 10/25/07	Thu 10/25/07			X
39	Q&D: prelim recommendation on plan design elements and RFP	1 day	Thu 10/25/07	Thu 10/25/07			X
40	Board Meeting: November 8	1 day	Thu 11/08/07	Thu 11/08/07		All	
41	Report on testimony	1 day	Thu 11/08/07	Thu 11/08/07			
42	Vote on plan design slate for 10/1/08	1 day	Thu 11/08/07	Thu 11/08/07		All	
43	Workgroup updates	1 day	Thu 11/08/07	Thu 11/08/07			
44	ADM: vote on admin model and member svcs model	1 day	Thu 11/08/07	Thu 11/08/07			
45	CCM: recommendation on long-term CCM strategies, tactics and vehicles	1 day	Thu 11/08/07	Thu 11/08/07			
46	PD/Q&D: final recommendation on RFP components	1 day	Thu 11/08/07	Thu 11/08/07			
47	Eligibility, rate structure and optout discussion	1 day	Thu 11/08/07	Thu 11/08/07			
48	Board Meeting: November 29	1 day	Thu 08/09/07	Thu 08/09/07		All	
49	Board Meeting: December 13	1 day	Thu 12/13/07	Thu 12/13/07		All	
50	Board approval of Staff recommended RFP pending DOJ approval	1 day	Thu 12/13/07	Thu 12/13/07			
51	Board Meeting: January 10	1 day	Thu 01/10/08	Thu 01/10/08		All	
52	Board Meeting: January 24	1 day	Thu 01/24/08	Thu 01/24/08		All	
53	Board Meeting: February 14	1 day	Thu 02/14/08	Thu 02/14/08		All	
54	Board Meeting: February 28	1 day	Thu 02/28/08	Thu 02/28/08		All	
55	Preliminary RFP update to Board	1 day	Thu 02/28/08	Thu 02/28/08			
56	Board Meeting: March 13	1 day	Thu 03/13/08	Thu 03/13/08		All	
57	Board Meeting: March 27	1 day	Thu 03/27/08	Thu 03/27/08		All	
58	Board Meeting: April 10	1 day	Thu 04/10/08	Thu 04/10/08		All	
59	Board Meeting: April 24	1 day	Thu 04/24/08	Thu 04/24/08		All	
60	Board Meeting: May 8	1 day	Thu 05/08/08	Thu 05/08/08		All	
61	Board Meeting: May 22	1 day	Thu 05/22/08	Thu 05/22/08		All	
62							
63	Identify the preferred method of administering OEBB at implementation (ADM WG)	31 days	Thu 09/27/07	Thu 11/08/07		ADM	
64	Workgroup meetings	31 days	Thu 09/27/07	Thu 11/08/07	8	ADM	X
65	Review current administration issues	31 days	Thu 09/27/07	Thu 11/08/07		ADM	X
66	Present recommended approach to the Board	31 days	Thu 09/27/07	Thu 11/08/07		ADM	
67	Develop change management work plan (COM WG)	31 days	Thu 09/27/07	Thu 11/08/07		CCM	
68	Workgroup meetings	11 days	Thu 09/27/07	Thu 10/11/07	64SS	CCM	X
69	Identify parties of interest and communication needs	11 days	Thu 09/27/07	Thu 10/11/07	64SS	CCM	X
70	Present recommendations to the Board	31 days	Thu 09/27/07	Thu 11/08/07	64SS	CCM	
71	Bring recommended plan design offerings to Board for review/approval (PD WG)	31 days	Thu 09/27/07	Thu 11/08/07		PD	
72	Gather data and review comparability	21 days	Thu 09/27/07	Thu 10/25/07		PD	X
73	Workgroup meetings	21 days	Thu 09/27/07	Thu 10/25/07		PD	X
74	Review high-level options for structure/rating	21 days	Thu 09/27/07	Thu 10/25/07		PD	X
75	Present recommendations to the Board	31 days	Thu 09/27/07	Thu 11/08/07		PD	

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ID	Task Name	Duration	Start	Finish	Predecessors	Responsibility	Completed
76	Recommend health and quality program requirements for initial RFP (Q&E WG)	31 days	Thu 09/27/07	Thu 11/08/07		Q&D	
77	Workgroup meetings	31 days	Thu 09/27/07	Thu 11/08/07		Q&D	X
78	Development of short-term recommendations	31 days	Thu 09/27/07	Thu 11/08/07		Q&D	
79							
80	Gather Employee Benefit Coverage Information from Districts (3.2)	66 days	Thu 08/09/07	Thu 11/08/07			
81	Determine definition of comparability	1 day	Thu 09/13/07	Thu 09/13/07	15FS-1 day	OEBB	X
82	Review design options	6 days	Thu 08/09/07	Thu 08/16/07	7FS-1 day	OEBB	X
83	Finalize District Information Request	5 days	Mon 09/17/07	Fri 09/21/07		Staff	X
84	Distribute District Information Request	1 day	Thu 10/04/07	Thu 10/04/07	83FS+8 days	Staff	X
85	Collect district information	5 days	Fri 10/05/07	Thu 10/11/07	84	WW	X
86	All District IR's Due	0 days	Thu 10/11/07	Thu 10/11/07	85	-	X
87	Review district information and summarize	6 days	Fri 10/12/07	Fri 10/19/07	86	WW	X
88	Develop draft program and design specifications (by coverage type)	6 days	Fri 10/12/07	Fri 10/19/07	87SS	WW	X
89	Develop summary of plan design alternatives/slate	6 days	Fri 10/12/07	Fri 10/19/07	87SS	WW	X
90	Medical/pharmacy	6 days	Fri 10/12/07	Fri 10/19/07		WW	X
91	Dental	6 days	Fri 10/12/07	Fri 10/19/07		WW	X
92	Long Term Care	6 days	Fri 10/12/07	Fri 10/19/07		WW	X
93	Life / AD&D	6 days	Fri 10/12/07	Fri 10/19/07		WW	X
94	Disability	6 days	Fri 10/12/07	Fri 10/19/07		WW	X
95	Review funding alternatives (insured, stoploss, etc.)	6 days	Fri 10/12/07	Fri 10/19/07	89SS	WW	X
96	Develop recommended rating approach (e.g., one pool, by area, etc.)	0 days	Fri 10/12/07	Fri 10/12/07	95SS	WW	
97	Review statewide costs by location	0 days	Fri 10/12/07	Fri 10/12/07	98	WW	X
98	Review district costs by size	0 days	Fri 10/12/07	Fri 10/12/07		WW	X
99	Meet with staff to review draft design specs	2 days	Fri 10/12/07	Mon 10/15/07	96	WW	X
100	Finalize recommended design specs	5 days	Tue 10/16/07	Mon 10/22/07	99	PD	X
101	Present draft design specs to Board for review and approval	1 day	Thu 10/25/07	Thu 10/25/07	100FS+2 days	PD	X
102	Present final design specs to Board for approval	1 day	Thu 11/08/07	Thu 11/08/07			
103							
104	Develop Cafeteria Plan (3.3)	39 days	Mon 12/03/07	Thu 01/24/08		WW	
105	Develop cafeteria plan specs with staff	2 days	Mon 12/03/07	Tue 12/04/07		WW	
106	Develop cafeteria plan document	25 days	Wed 12/05/07	Tue 01/08/08	105	ADM	
107	Determine cafeteria plan interface with districts (if needed)	2 days	Wed 01/09/08	Thu 01/10/08	106	ADM	
108	Obtain legal counsel review of cafeteria plan document	10 days	Fri 01/11/08	Thu 01/24/08	107	Staff	
109	Present cafeteria plan document to Board for approval	1 day	Thu 01/24/08	Thu 01/24/08	108FS-1 day	ADM	
110							
111	RFP Process for Employee Benefit Coverage (3.4)	129 days	Mon 10/29/07	Thu 04/24/08		Staff	
112	Kick off meeting to discuss RFP objectives and process	1 day	Mon 10/29/07	Mon 10/29/07	101FS-4 days	Staff/WW	X
113	Preparation for kickoff meeting	1 day	Mon 10/29/07	Mon 10/29/07		Staff/WW	X

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ID	Task Name	Duration	Start	Finish	Predecessors	Responsibility	Completed
114	Identify all coverages in need of RFP	1 day	Mon 10/29/07	Mon 10/29/07		Staff/WW	X
115	Discuss extent of vendor/service bundling desired	1 day	Mon 10/29/07	Mon 10/29/07		Staff/WW	X
116							
117	Medical/Pharmacy	129 days	Mon 10/29/07	Thu 04/24/08		Varies	
118	Draft RFP specifications	41 days	Mon 10/29/07	Mon 12/24/07		WW	
119	First draft of questionnaire, financial response and scoring to OEBB Staff	12 days	Mon 10/29/07	Tue 11/13/07	115FS-1 day		
120	OEBB Staff returns review of first draft to WW	5 days	Wed 11/14/07	Tue 11/20/07	119		
121	Final draft of questionnaire, financial response and scoring to OEBB Staff	10 days	Wed 11/21/07	Tue 12/04/07	120		
122	Staff provides final approval of questionnaire/financial response/scoring to WW	5 days	Wed 12/05/07	Tue 12/11/07	121		
123	DOJ preview of RFP documents	10 days	Tue 12/11/07	Mon 12/24/07	122FS-1 day		
124	Collect and organize supplemental information for RFP	30 days	Tue 10/30/07	Mon 12/10/07	115		
125	Develop ORPIN site	30 days	Tue 10/30/07	Mon 12/10/07	115		
126	Determine Selection Committee for manually scored RFP sections	30 days	Tue 10/30/07	Mon 12/10/07	115		
127	Determine process for unidentified vendors to obtain online procurement login	30 days	Tue 10/30/07	Mon 12/10/07	115		
128	Approve RFP documents	1 day	Thu 12/13/07	Thu 12/13/07	123SS+2 days	All/DOJ	
129	Approval of RFP by DOJ	8 days	Fri 12/14/07	Tue 12/25/07	128	Staff	
130	Finalize RFP documents based on DOJ feedback	7 days	Wed 12/26/07	Thu 01/03/08	129		
131	Release RFP to vendor market	0 days	Thu 01/03/08	Thu 01/03/08	129FS+7 days	WW	
132	Monitor RFP process	17 days	Thu 01/03/08	Fri 01/25/08		WW	
133	Maintain and monitor ORPIN site	1 day	Thu 01/03/08	Thu 01/03/08	131FS-1 day		
134	Vendor questions due	10 days	Fri 01/04/08	Thu 01/17/08	133		
135	Collect, organize and draft responses to vendor questions	5 days	Fri 01/18/08	Thu 01/24/08	134		
136	OEBB response to vendor questions due	1 day	Fri 01/25/08	Fri 01/25/08	135		
137	Proposals due from vendors	30 days	Thu 01/03/08	Wed 02/13/08	131FS-1 day	-	
138	Preliminary update to Board	1 day	Thu 02/28/08	Thu 02/28/08	137FS+10 days	WW	
139	Analyze RFP responses	40 days	Wed 02/13/08	Tue 04/08/08		WW	
140	WW confirms receipt of all required docs to establish vendors to be scored	4 days	Wed 02/13/08	Mon 02/18/08	137FS-1 day		
141	WW procurement tool scores auto scored RFP sections	5 days	Wed 02/13/08	Tue 02/19/08	137FS-1 day		
142	OEBB Staff and WW confirm vendors that qualify for presentations	10 days	Wed 02/20/08	Tue 03/04/08	141		
143	Prepare for and Conduct qualifying vendor meetings	10 days	Wed 03/05/08	Tue 03/18/08	142	WW	
144	WW, OEBB Staff and Selection Committee score manual sections	9 days	Wed 03/19/08	Mon 03/31/08	143		
145	WW submits clarifying questions to vendors/collects responses, as necessary	1 day	Wed 03/26/08	Wed 03/26/08	143FS+5 days		
146	OEBB Staff, WW and Selection Committee meet to compare scores	1 day	Tue 04/01/08	Tue 04/01/08	144		
147	Prepare financial summary and evaluation report	5 days	Wed 04/02/08	Tue 04/08/08	146	WW	
148	Review evaluation report and select finalists	1 day	Wed 04/09/08	Wed 04/09/08	147	Staff	
149	Additional time to select finalists (if necessary)	3 days	Wed 04/02/08	Fri 04/04/08	146	-	
150	Conduct follow-up with vendors to clarify offers	5 days	Mon 04/07/08	Fri 04/11/08	149	WW	
151	Prepare final vendor evaluation report	5 days	Mon 04/07/08	Fri 04/11/08	149	WW	

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152	Conduct site visits with finalist(s) and summarize findings	5 days	Wed 04/16/08	Tue 04/22/08	151FS+2 days	Staff	
153	OEBB/WW negotiation with finalist(s)	1 day	Wed 04/23/08	Wed 04/23/08	152		
154	Approval of apparent successful vendor(s)	1 day	Thu 04/24/08	Thu 04/24/08	153	OEBB	
155							
156	Dental	129 days	Mon 10/29/07	Thu 04/24/08		Varies	
157	Project steps similar to Medical/Pharmacy	129 days	Mon 10/29/07	Thu 04/24/08	118SS	Varies	
158	Expect to run in parallel with Medical/Pharmacy	129 days	Mon 10/29/07	Thu 04/24/08	118SS	Varies	
159							
160	Long Term Care	129 days	Mon 10/29/07	Thu 04/24/08		Varies	
161	Project steps similar to Medical/Pharmacy	129 days	Mon 10/29/07	Thu 04/24/08	118SS	Varies	
162	Expect to run in parallel with Medical/Pharmacy	129 days	Mon 10/29/07	Thu 04/24/08	118SS	Varies	
163							
164	Life / AD&D	129 days	Mon 10/29/07	Thu 04/24/08		Varies	
165	Project steps similar to Medical/Pharmacy	129 days	Mon 10/29/07	Thu 04/24/08	118SS	Varies	
166	Expect to run in parallel with Medical/Pharmacy	129 days	Mon 10/29/07	Thu 04/24/08	118SS	Varies	
167							
168	Disability	129 days	Mon 10/29/07	Thu 04/24/08		Varies	
169	Project steps similar to Medical/Pharmacy	129 days	Mon 10/29/07	Thu 04/24/08	118SS	Varies	
170	Expect to run in parallel with Medical/Pharmacy	129 days	Mon 10/29/07	Thu 04/24/08	118SS	Varies	
171							
172	Negotiate and Execute Carrier Contracts (3.5)	299 days	Thu 08/23/07	Tue 10/14/08		Staff/WW	
173	Negotiate final terms (each of the above coverages)	10 days	Fri 04/25/08	Thu 05/08/08	154	Staff/WW	
174	Negotiate carrier performance guarantees (each)	10 days	Fri 04/25/08	Thu 05/08/08	173SS	Staff/WW	
175	Select and notify carriers	5 days	Fri 05/09/08	Thu 05/15/08	174	Staff/WW	
176	Review draft contracts	20 days	Fri 05/16/08	Thu 06/12/08	175	DOJ	
177							
178	Monitor Implementation Process	103 days	Fri 05/23/08	Tue 10/14/08		Staff/WW	
179	Attend carrier implementation kickoff meetings	2 days	Fri 05/23/08	Mon 05/26/08	175FS+5 days	Staff/WW	
180	Monitor ongoing implementation calls and meetings	101 days	Tue 05/27/08	Tue 10/14/08	179	Staff	
181							
182	Communications	289 days	Thu 08/23/07	Wed 10/01/08		CCM	
183	Identify parties of interest	26 days	Thu 08/23/07	Thu 09/27/07	9FS-1 day	CCM	
184	Draft communications workplan	152 days	Thu 09/27/07	Fri 04/25/08		CCM	
185	Milestones	152 days	Thu 09/27/07	Fri 04/25/08	22FS-1 day	CCM	
186	Media	152 days	Thu 09/27/07	Fri 04/25/08	22FS-1 day	CCM	
187	Responsibilities	152 days	Thu 09/27/07	Fri 04/25/08	22FS-1 day	CCM	
188	Design and development of communications	60 days	Mon 02/04/08	Fri 04/25/08	189FS-60 days	CCM	
189	Pre-announcement to members	1 day	Fri 04/25/08	Fri 04/25/08	154	CCM	

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ID	Task Name	Duration	Start	Finish	Predecessors	Responsibility	Completed
190	Distribution of open enrollment communications	4 days	Mon 08/11/08	Thu 08/14/08	193SS-5 days	CCM	
191	Member meetings	10 days	Mon 08/18/08	Fri 08/29/08	193SS	CCM	
192							
193	Open Enrollment	20 days	Mon 08/18/08	Fri 09/12/08		-	
194							
195	Coverage Effective Date	0 days	Wed 10/01/08	Wed 10/01/08		-	
196							
197							
198	Attend Meetings with Board and Staff (3.6)	240 days	Fri 08/10/07	Thu 07/10/08		All	
199	Weekly meetings for first two months	40 days	Fri 08/10/07	Thu 10/04/07	5	All	X
200	Weekly conference calls throughout pre-implementation process	200 days	Fri 08/10/07	Thu 05/15/08	199SS	All	
201	Monthly Board meetings	240 days	Fri 08/10/07	Thu 07/10/08	200SS	All	
202							
203	Report Progress to Board and Staff (3.7)	299 days	Thu 08/09/07	Wed 10/01/08		WW	
204	Update project plan to report progress each month by 15th	240 days	Fri 08/10/07	Thu 07/10/08	200SS	WW	
205							
206	Establish Financial Reporting Structure	221 days	Thu 08/09/07	Thu 06/12/08		Q&D	
207	Meet with staff to determine reporting needs and timing	1 day	Thu 08/09/07	Thu 08/09/07		Q&D	
208	Determine whether data warehouse can fill financial reporting needs	60 days	Fri 08/10/07	Thu 11/01/07	207	Q&D	
209	Design financial reporting package	60 days	Fri 11/02/07	Thu 01/24/08	208	Q&D	
210	Meet with carriers to confirm data needs	10 days	Fri 01/25/08	Thu 02/07/08	209	Q&D	
211	Review draft financial reporting package with staff	30 days	Fri 02/08/08	Thu 03/20/08	210	Q&D	
212	Finalize financial reporting package	60 days	Fri 03/21/08	Thu 06/12/08	211	Q&D	
213							
214	Establish Data Warehousing	299 days	Thu 08/09/07	Wed 10/01/08		Q&D	
215	Meet with staff to determine data warehousing/reporting needs	1 day	Thu 08/09/07	Thu 08/09/07		Q&D	
216	Develop data warehousing specs with warehouse partner	30 days	Thu 08/09/07	Wed 09/19/07		Q&D	
217	Develop data warehouse implementation plan	90 days	Thu 08/09/07	Wed 12/12/07		Q&D	
218	Design quarterly utilization and trends report	30 days	Thu 08/09/07	Wed 09/19/07		Q&D	
219	Design annual plan performance report	30 days	Thu 08/09/07	Wed 09/19/07		Q&D	
220	Data warehouse go-live date	0 days	Wed 10/01/08	Wed 10/01/08	195	Q&D	