



Amendment of Solicitation

Date of Issuance: 05/20/2019

Solicitation No. 8079001092

Requisition No.

Amendment No. 1

Hour and date specified for receipt of offers is changed: [X] No [] Yes, to: CST

Pursuant to OAC 260:115-7-30(d), this document shall serve as official notice of amendment to the solicitation identified above. Such notice is being provided to all suppliers to which the original solicitation was sent. Suppliers submitting bids or quotations shall acknowledge receipt of this solicitation amendment prior to the hour and date specified in the solicitation as follows:

- (1) Sign and return a copy of this amendment with the solicitation response being submitted; or,
(2) If the supplier has already submitted a response, this acknowledgement must be signed and returned prior to the solicitation deadline. All amendment acknowledgements submitted separately shall have the solicitation number and bid opening date printed clearly on the front of the envelope.

ISSUED BY and RETURN TO:

U.S. Postal Delivery:

Susan Geyer Contracting Officer

405 - 522 - 7199 Phone Number

, OK - or

Personal or Common Carrier Delivery:

procurement@okhca.org E-Mail Address

,OK -

Description of Amendment:

a. This is to incorporate the following:

This Amendment #1 incorporates the answers to bidder's questions into the RFP.

b. All other terms and conditions remain unchanged.

Supplier Company Name (PRINT)

Date

Authorized Representative Name (PRINT) Title

Authorized Representative Signature

RFP Questions

Entity Name: _____

Question #	RFP Section(s):	Entity Question	OHCA Answer
1	Section C, Instructions to Bidder. Page 6, C.6 PROPOSAL RESPONSE REQUIREMENTS, #3.	Is the Bidder able to include a Table of Contents in the response? Or will these count as "extra pages"?	These would be considered extra pages
2	Section C, Instructions to Bidder. Page 6, C.6 PROPOSAL RESPONSE REQUIREMENTS, #3.	Is the Bidder able to include a Report Cover (which would include the vendor's name and solicitation number) in the response? Or will these count as "extra pages"?	These would be considered extra pages

	<p>Section C, Instructions to Bidder. Page 6, C.6 PROPOSAL RESPONSE REQUIREMENTS, #5.</p> <p>3</p>	<p>Our email system will not allow us to transmit data that appears to contain a Social Security Number (SSN), Personally Identifiable Information (PII) or Protected Health Information (PHI). This has occasionally results in our RFP responses being blocked by our email system due to the RFP number resembling SSN data, PII or PHI. To ensure that our response is received, will the state accept responses that are encrypted by IronPort/Cisco Email Security or a similar tool that encrypts the body of the email as well as attachments? The State will receive an email requiring them to create a user account and password that they must use to open the message and all subsequent messages encrypted in this fashion.</p>	<p>Yes, you may also send a test email in advance of the submission date.</p>
	<p>Section C, Instructions to Bidder. Page 6, C.6 PROPOSAL RESPONSE REQUIREMENTS, #5.</p> <p>4</p>	<p>What is the email size limit that OHCA's system will accept? If the Bidder's proposal exceeds this amount, would it be acceptable to submit the proposal in multiple emails?</p>	<p>15MB- Yes, it is acceptable to submit in multiple emails</p>
	<p>Section C, Instructions to Bidder. Page 6, C.6 PROPOSAL RESPONSE REQUIREMENTS, #10, b. Section Two – References and resumes.</p> <p>5</p>	<p>Are three references needed per each experience area (a-n) being bid on?</p>	<p>No</p>

6	Section C, Instructions to Bidder. Page 6, C.6 PROPOSAL RESPONSE REQUIREMENTS, #10, b. Section Two – References and resumes.	Is a Bidder able to use Oklahoma as a reference?	You may use other entities in Oklahoma, but not the OHCA
7	Section C, Instructions to Bidder. Page 6, C.6 PROPOSAL RESPONSE REQUIREMENTS, #10, c. Section Three – Financial Viability	Can a Bidder include the Annual Report as a link? If a hard copy is required, can the Annual report be included in an appendix versus the body of the response?	The Financial Viability can be an provided from an excerpt of the annual report. OHCA requires documents to be submitted electronically.
8	General Question	Do Bidders qualify per experience area (a-n) that are responded to? Or, is the totality of the experience used to qualify the Bidder for all future Project Requests that may be issued?	Bidders qualify per experience area. Bidders who do not propose services for a business area will not receive project requests for that specific business area during the term of the contract.
9	Attachment Four, Technical Narrative Questions. Page 1, Item 2. Subcontractors	OHCA has requested that the Bidder "describe the activities to be performed by the subcontractor(s) and how you will monitor their work." Should this information be included in the Corporate Information section or woven into the appropriate response a-n, in the Relevant Experience section of the response?	Woven into the appropriate response a-n.

<p>10</p>	<p>Attachment Four, Technical Narrative Questions. Page 2, Item 6. Implementation Milestones</p>	<p>OHCA has requested an Implementation Plan that shows major tasks and implementation milestones. However, Section C Instructions to Bidders, page 6, C.6 Proposal Response, Requirements, #10, d. Section Four - Technical Response (i)(2) indicates Milestone schedule to be established at beginning of each task order. Can OHCA confirm that a Milestone Schedule is not required as part of the Technical Response?</p>	<p>This is more of a general question of your implementation process. What is your implementation process? Are there other conflicting projects that could delay implementation? How do you resolve those issues?</p>
<p>11</p>	<p>Attachment 6 Pricing Instructions - General Question</p>	<p>The 1st worksheet in the Pricing Proposal indicates "Attachment 7 Pricing Instructions" is this the correct Pricing Exhibit? Additionally, the header for this file, when printed, indicates "Care Management Technical Requirements", should this be changed to reflect the RFP Services and RFP Number?</p>	<p>This is a clerical error and should be named Attachment 6 in the header. Please change the file header to reflect the correct RFP name and number. I apologize for the clerical error.</p>
<p>12</p>	<p>A.3 - Table 2</p>	<p>Can the Project Director and Project Manager positions be combined in the same individual, as long as all of the required activities are addressed?</p>	<p>yes</p>
<p>13</p>	<p>A.3 - Table 2 - Project Manager</p>	<p>Is an advanced degree in management (i.e., Masters in Management), combined with demonstrated project management experience, acceptable in lieu of certification from an organization such as PMI?</p>	<p>yes</p>

14	C.6.10.c.i	As a smaller private company, we use an outside accounting firm to prepare financial statements but they are not formally audited. Is it acceptable to the OHCA if we submit unaudited balance sheet information as prepared by independent accountants in lieu of audited financials and agree to have audited financial statements prepared in the future, if the OHCA later requires them?	Yes, OHCA reserves the right to require audited financial statements
15	C.6.10.d.i.1.a	Does the 15-page limit apply across all subcategories a - n, or are bidders permitted 15 pages for subcategory a, 15 pages for subcategory b etc.? Are there any other page limits within Attachment 4?	Bidders are allowed 15 pages per subcategory for Attachment 4
16	C.6.10.d.i.2	Please confirm that the Milestone Schedule is only to be submitted in response to a Task Order after contract award and not as part of this RFP response.	This is more of a general question of your implementation process. What is your implementation process? Are there other conflicting projects that could delay implementation? How do you resolve those issues?
17	C.6.10.e.ii	Since the not-to-exceed amount is a total contract value (\$2 million) and the pricing sheet is expressed as hourly rates, please confirm that bidders do not need to address the \$2 million component in the pricing response.	The bidders do not need to address the \$2 million component.

18	Attachment 4: Technical Narrative: Question 3	Will the State accept both firm and individual team member's experience in the summary?	Yes
19	Attachment 4: Technical Narrative: General Instructions	The instructions say to "use separate pages." Can you clarify what this means?	Use separate pages for each question and clearly reference the question number
20	Section C.6: Instructions to Bidders: Item 10.b.: Section 2: References and Resumes: ii	Are the three references mentioned in this section the same as the three mentioned in Section i?	yes
21	Section C.6: Instructions to Bidders: Item 10.b.: Section 2: References and Resumes: ii	Can you clarify what is meant by "proposed solution currently in use?"	Provide references where the Bidder currently performs commiserate services to what is being proposed for this RFP.
22	Section C.6: Instructions to Bidders: Item 10.b.: Section 2: References and Resumes: iii	Would the State allow the following as key positions: 1. Overall Contract Director (for overall master contract) 2. Project Director (for each "Relevant Experience Area"), 3. Project Manager (for each "Relevant Experience Area")?	Yes
23	Section C.6: Instructions to Bidders: Item 10.b.: Section 2: References and Resumes: iii	Does the State expect one Project Director/one Project Manager for the entire scope or for each "Relevant Experience Area"?	The state expects one Project Director, with overall responsibility for the states needs.
24	Section C.6: Instructions to Bidders: Item 10.b.: Section 2: References and Resumes: iii	Would the State allow additional key staff personnel resumes (in addition to the RFP-defined key staff positions of Project Director and Project Manager)?	The state will allow up to 3 additional key staff personnel resumes. Additional staffing detail may be provided in an org chart.
25	Attachment 4: Question 5: Key Personnel Staffing Model	Would State allow the inclusion of an Organizational Chart in this section?	See question 24

26	Attachment 4: Technical Narrative: Question 3: Relevant Technical Experience: a. PACE Programs	Is there a specific type of experience with PACE programs that the State is interested in seeing?	Please detail the Bidder's experience with PACE programs.
27	Section C.6: Instructions to Bidders: Item 10.c.: Section 3: Financial Viability	As a CPA firm, we do not have audited financial statements. Would the State accept our unaudited financial statements and/or our Dun & Bradstreet report?	Yes, OHCA reserves the right to require audited financial statements
28	Section C.6: Instructions to Bidders: Item 6: Proposal	May we use our own formatting for the Technical Response, as long as all areas on Attachment 4 are included and we adhere to the font and margin sizes?	No
29	Section C, c.6.10.d.i.1.a	Given the page length restriction, to help ensure the State receives thorough and comprehensive responses, will the State accept proposals that use a size 11 point font, Arial, for proposal content, and 10 point, Arial font for graphics/tables?	No
30	Section C, c.6.10.b.ii	Can the State clarify if only 3 references should be provided, or if vendors can provide 3-10 references as specified in Attachment 3?	A minimum of 3 and a maximum of 10 references will be accepted
31	Section C, c.6.10.a.iv	Will requesting any exceptions to the terms and conditions of the RFP negatively impact a vendor's overall proposal score?	OHCA reserves the right to negotiate with selected vendors per D.3. Inability to agree to terms shall result in non-award to that specific vendor.

32	Section D, d.1.2.c.i	Can the State provide the template or calculation that will be used for the "Scoring of Attachment 6 – Pricing shall be conducted separately using a predetermined method of calculation", or provide additional details on how the price proposal will be evaluated?	The state will not provide any additional information related to the evaluation process
33	Section A, A.2.c	Can the State identify the firms that have provided "consultant expertise" in the areas listed in this section of this document?	Mercer, Pacific Health Policy Group, and Myers and Stauffer
38	Section C, Instructions to Bidder. Page 6, C.6 PROPOSAL RESPONSE REQUIREMENTS, #10, b. Section Two – References and resumes.	Are three references needed per each experience area (a-n) being bid on?	No, just three overall references are required
39	Section C, Instructions to Bidder. Page 6, C.6 PROPOSAL RESPONSE REQUIREMENTS, #10, b. Section Two – References and resumes.	Is a Bidder able to use Oklahoma as a reference?	Yes, as long as it is another entity and not OHCA
40	Section C, Instructions to Bidder. Page 6, C.6 PROPOSAL RESPONSE REQUIREMENTS, #10, c. Section Three – Financial Viability	Can a Bidder include the Annual Report as a link? If a hard copy is required, can the Annual report be included in an appendix versus the body of the response?	See question 7

41	General Question	Do Bidders qualify per experience area (a-n) that are responded to? Or, is the totality of the experience used to qualify the Bidder for all future Project Requests that may be issued?	The state will not provide any additional information related to the evaluation process
42	Attachment 5 Potential Optional Services	Given the project request format outlined in this proposal, what types of optional services, in addition to the SOW, are anticipated?	OHCA relies on the Bidder to determine if optional services may be offered by their respective company.
43	Section C, Instructions to Bidder. Page 6, C.6 PROPOSAL RESPONSE REQUIREMENTS, #2.	For text included in headings, footings, headers, section titles - do these items need to be included as Times New Roman and in 12 point font?	Yes
44	General Question	In order to ensure forms are not edited, can a Word file be provided for the following items: Section A, Section B, Section C, Section D, Attachment 4?	Attachment 4 will be provided as a Word document, but the remaining documents shall remain PDF files.
45	Section C, Instructions to Bidder. Page 6, C.6 PROPOSAL RESPONSE REQUIREMENTS, #10, d, 1, a.	If bidder were to provide a sample work product, would it need to be contained in the 15 pages for each items a-n?	yes
46	Section C, Instructions to Bidder. Page 6, C.6 PROPOSAL RESPONSE REQUIREMENTS, #10, d, 1, a.	If bidder were to provide a sample work product, that exceeded the 15 page response limitation, would the bidder be able to provide it as an attachment in the appendix of our response?	Appendices will not be evaluated
47	n/a	How many vendors does the state currently contract under this procurement?	3

48	Section A. Scope of Work, Table 2 Contract Key Roles and Responsibilities	The Project Manager qualifications state, "Possess current Project Management professional certification." Will the state accept a qualified candidate who will pursue this certification within the first year of the contract?	yes
49	Attachment 4 Technical Narrative, 3. k.	Can the state further clarify the definition of Complex Requests for Proposals (RFPs)?	The Bidder may review the closed RFPs on the Procurement page on the OHCA website to see examples of OHCA RFPs.
50	Section C, pg 6 and Attachment 4, pg 2	Section C, pg 6 indicates that the milestone schedule shall be established at the beginning of each task order. Attachment A, pg 2 asks for an implementation plan that shows major tasks and implementation milestones. Please clarify what should be included in proposal response for the implementation plan if the milestone schedule will be established based on specific task order requests.	Please provide samples of your implementation planning and major tasks
51	Attachment 4, pg 2	Does OHCA have specific deadlines for contract activities that must be considered in the implementation plan?	Each project will have a implementation schedule included that the Contractor may provide input into as part of their Project Request response.

52	C.1.12 indicates that "ALL travel expenses to be incurred by the supplier in performance of the Contract shall be included in the total proposed price/contract amount.	Does this mean that travel expenses must be included in the hourly rates requested in the Cost Proposal? Alternatively, does this mean that expenses must be outlined in the individual Project Request proposals? Please provide guidance to bidders in determining the travel required by OHCA under this contract when the scope of each Project Request is not yet known?	Travel expenses should be included in your hourly rates. OHCA will not pay travel expenses for each project. Each project request will define expected travel.
53	General	Will total proposed price/contract amount be based on the Project Request(s)?	yes
54	Attachment 6 RFP Section C.6.10.e.ii. Reads, "If the submitted Price Proposal form exceeds that non-to-exceed defined in Attachment 6 the proposal shall be deemed non-responsive."	The RFP indicates that Attachment 6, Pricing should not exceed the not-to-exceed defined in Attachment 6. Attachment 6 appears to only be requesting hourly rates. How should bidders determine compliance with RFP stipulations if only hourly rates are being requested? How are the hourly rates tallied to arrive at or be compared with the non-to-exceed?	Bidders should define their hourly rates for each position that will be used on this project. OHCA will not comment on how rates will be evaluated.
55	Attachment 6	What type of information is to be placed in the "DESCRIPTION" field for each Position Title?	The bidder should define what type of work each proposed staff will be responsible for.
56	Attachment 6	Please clarify what should be placed in column K (Total column) of the pricing spreadsheet.	Column K will not be used for this RFP
57	Attachment 6	How should the bidder reflect any optional services in the pricing spreadsheet?	The bidder should add additional lines to Attachment 6 to define optional services.

58	General	Will awardees <u>of this procurement</u> be required to competitively bid against one another on Project Requests when issued?	Depending on the service and the number of awardees the vendors will be subject to bid on each project request
59	General	Will awardees <u>of this procurement</u> submit proposals (with budgets) in response to Project Requests when issued?	yes
60	Past Performance Survey	Please confirm our understanding is correct: A past or current client is to complete the survey, sign and scan the form, return the form to us electronically in time for us to include it in the proposal.	This is correct
61	Past Performance Survey	Please confirm that past or current clients are not required to complete the past performance survey <u>in hard copy</u> , and sign and return the form to us in time for us to include it in the proposal.	These can be sent electronically, but are required for the submission of your proposal
62	RFP Attachment 4	It does not appear that Attachment 4 requests bidders to provide narrative describing their methodology and approach to the scope of work outlined in the RFP. (a) Is our understanding correct? and (b) Will a bidder's methodology and approach will be requested to be included in their "written response" to each Project Request?	The state would expect methodology and approach to be addressed in each sub-category of question 3 along with specific requests.
63	RFP Section C.6.5	Please confirm that a hard copy proposal submittal is not also required in addition to the email submittal.	A hard copy is not required

64	Instructions to Attachment 4 - Technical Narrative	Instructions indicate that Attachment Four shall be limited to 15 pages per <u>subcategory a - n</u> . Please confirm that a bidder's response to Attachment Four Question 1 and 2 along with 4-8 are not subject to any page limits.	Bidders are allowed 15 pages per subcategory for Attachment 4
65	RFP Section D.1 - Evaluation Process	Section D.1.2.c.i indicates that Pricing shall be conducted separately using a predetermined method of calculation. Please provide or describe that predetermined method of calculation. Given that the Attachment 6 requires hourly rates only.	The state will not provide any additional information related to the evaluation process
66	RFP Section D - Evaluation Process	What percentage of the evaluation score will be based on pricing, the technical narrative, etc.?	The state will not provide any additional information related to the evaluation process
67	RFP Section D - Evaluation Process	How are the different sections of the technical narrative weighted during the evaluation?	The state will not provide any additional information related to the evaluation process

68	Attachment 4, #3	3.b is "Providing quality measures for Medicaid programs" and 3.d is "Quality Measures, Performance Improvement Projects". Does OHCA prefer the vendor to restate the quality measure experience when responding to 3.d? Or does 3.b contemplate the bidder responding with experience performing quality measures for Medicaid programs, while 3.d contemplates the bidder responding with experience assisting states with selecting quality measures?	Bidder should restate, and indicate their experience with each service as understood by the Bidder.
69	Attachment 4, #3	In 3.d, should the bidder respond with experience assisting non-Medicaid state agencies select quality measures (such as Mental Health and Substance Use Disorder quality measures for Departments of Mental Health or Offices of Behavioral Health)?	The bidder should respond with any experience that is relevant.
70	Attachment 4, #3	In 3.d, should the bidder respond with experience assisting non-Medicaid state agencies select quality measures (such as Mental Health and Substance Use Disorder quality measures for Departments of Mental Health or Offices of Behavioral Health)?	The bidder should respond with any experience that is relevant.