

# Care Management Request for Proposal



**Section C Instructions to Bidder**

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### **C. Bidder's Instructions**

#### **1. General Information:**

- a. The contract officer listed in Section B of this RFP is the only individual with whom the Bidder shall be in contact concerning any issues with this RFP. Failure to comply with this requirement may result in the Bidder's proposal response being considered nonresponsive and not considered for further evaluation.
- b. This RFP relies on the Bidder's expertise and experience in determining how to achieve OHCA's goals and to define and deliver the required services, and requires the successful Bidder to develop and write a detailed response.
- c. Bidders are urged to read this RFP carefully. Failure to do so will be at the Bidder's risk. Provisions, terms, and conditions may be stated or phrased differently than in previous RFPs. Proposals will be evaluated and any resultant contract(s) will be administered in strict accordance with the plain meaning of the contents hereof irrespective of past interpretations, practices, or customs.
- d. Unless otherwise specified in this RFP, manufacturers' names, brand names, information, and/or catalog numbers listed in a specification are for informational purposes only and not intended to limit competition. Bidder may offer any brand for which it is an authorized representative which meets or exceeds the specification for any item(s). However, if a Bid is based on equivalent products, indicate in the response to the RFP the manufacturer's name and number. The Bidder shall also explain in detail the reason(s) why the proposed equivalent will

meet the specifications and not be considered an exception thereto. Bids that do not comply with these requirements are subject to rejection.

- e. Either OHCA or the Bidder(s) may discontinue the contracting process at any time.
- f. Acceptance of RFP Content
- g. All Bids shall be firm representations that the responding Bidder has carefully investigated and will comply with all terms and conditions contained in this RFP. Any exceptions to the terms and conditions must be submitted in Section One of the Bidder's Proposal. Upon award of any contract to the successful Bidder, the contents of this RFP shall become contractual obligations between the parties. Failure to provide all proposed Amendments to the terms and conditions contained in this RFP of the Bid may cause the Bid to be rejected from consideration for award.
- h. Rejection of Offer
- i. The State reserves the right to reject any Bids that do not comply with the requirements and specifications of this RFP. A Bid may be rejected when the Bidder imposes terms or conditions that would modify requirements of this RFP or limit the Bidder's liability to the State. Other possible reasons for rejection of Bids are listed in OAC 260:115-7-32.
- j. Attempts to impose unacceptable conditions on the State, or impose alternative terms not in the best interest of the State shall not be tolerated. Continued attempts to impose unacceptable conditions or terms on the State shall result in a determination of non-responsiveness of the Bid due to lack of compliance with the terms and conditions of negotiation or this RFP.
- k. Bids are subject to public disclosure in accordance with the Oklahoma Open Records Act. To the extent permitted by such Act, the Bid will not be disclosed, except for purposes of evaluation, prior to approval by the State CIO of the awarded Contract. All material submitted becomes the property of the State. Bids will not be considered confidential after award of the Contract except that information in the Bid determined to be confidential by the State CIO shall continue to be considered confidential.
- l. Unless otherwise specified in the Oklahoma Open Records Act, Central Purchasing Act, or other applicable law, documents and information a Bidder submits as part of or in connection with a Bid are public records and subject to disclosure. If a Bidder claims any portion of its Bid as financial or proprietary confidential information, the Bidder must specifically identify what documents or portions of documents are considered confidential and identify applicable law supporting the claim of confidentiality. In addition, the Bidder shall submit the information separate and apart from the Bid and mark it Financial or Proprietary and Confidential. Pursuant to the Oklahoma State Finance Act, the State CIO

shall make the final decision as to whether the separately submitted information is confidential.

- m. If the State CIO does not deem the information to be confidential, OMES – will return or destroy the information with proper notice to the Bidder and the information will not be considered in the evaluation. A Bid marked, in total, as financial or proprietary and/or Confidential shall not be considered.
- n. All public documents related to this RFP shall be made available on the OMES wiki at the following link: <https://wiki.ok.gov/display/itprocurement/8700000044>. This includes the RFP Library, RFP, and Amendments.
- o. All Bids submitted shall be consistent with the Oklahoma Central Purchasing Act, Information Services Act, and associated statutes and rules, as applicable.
- p. All costs incurred by the Bidder for response preparation and participation in this RFP process will be the sole responsibility of the Bidder. The State will not reimburse any Bidder for any such costs.
- q. By submitting a Bid, Bidder agrees not to make any claims for damages or have any rights to damages because of any misunderstandings or misrepresentation of the specification or because of any misinformation or lack of information.
- r. The deadline for submitting responses to be considered for award is defined in Section B. Scope of Work. Responses received after the submission deadline will not be considered. If a late submission is received, the State will attempt to return the submission to the vendor, at the Bidder's expense. If the Bidder declines to receive the submission or the State is unable to receive a response from the Bidder within a reasonable time frame, the submission will be destroyed.
- s. Proposal shall remain firm for a minimum of one hundred eighty (180) days from the RFP closing date. Bidders guarantee unit prices to be correct. In accordance with 74 O.S §85.40, all travel expenses to be incurred by the Bidder in performance of the Contract shall be included in the total proposal price/contract amount.

## 2. Bidder Questions

- a. Bidder may submit general questions concerning the specifications of this RFP. All questions and answers regarding this RFP shall be posted to the IT procurement wiki at:  
  
<https://wiki.ok.gov/display/itprocurement/8070000044>
- b. Questions received via any other means will not be addressed. To register with the State of Oklahoma for wiki access, please follow the link below to request access.

[https://www.ok.gov/triton/modules/formbuilder/form.php?form\\_id=d432ccf8aabf5d6355bd1771fabb357ca246cd410bcf1394fb7a08606bbcf627](https://www.ok.gov/triton/modules/formbuilder/form.php?form_id=d432ccf8aabf5d6355bd1771fabb357ca246cd410bcf1394fb7a08606bbcf627)

- c. In order to guarantee that wiki access is created prior to the closing date for submitting questions for a RFP, please request access at least five (5) business days prior to the closing date for questions. The State of Oklahoma cannot be responsible for a Bidder's lack of access if the request is not made within this timeline.
  - i. When posing questions, every effort should be made to:
    - 1. be concise
    - 2. include section references, when possible; and
    - 3. avoid use of tables or special formatting (use simple lists).
- d. These questions shall be answered directly on the wiki and in the form of an amendment and posted on the OMES - website and linked on the wiki. Bidders are advised that any questions received after 3:00 P.M. Central Time on Friday, December 28, 2018 shall not be answered.

### **3. RFP Amendments**

- a. No alterations to the contract documents, including all Sections and Attachments, will be made or accepted without a formal Amendment to the RFP. Submissions must include the most current, unaltered version of all Attachments. Attempts to alter RFP documents in ways other than specified in the RFP shall result in the Bid being deemed non-responsive.
- b. OMES shall post amendments to this RFP on its wiki. It is the Bidder's responsibility to check frequently for any possible amendments that may be issued. OMES is not responsible for a Bidder's failure to acquire any amendment documents required to complete a RFP.
- c. The Bidder shall acknowledge receipt of any and all amendment(s) to this RFP by signing and returning the amendment(s) with its proposal. Failure to acknowledge RFP amendment(s) may be grounds for rejection.
- d. No oral statement of any person shall modify or otherwise affect the terms, conditions, or specifications stated in the RFP. All amendments to the RFP shall be made in writing by OHCA.
- e. In no event shall the Bidder's failure to read and understand any term or condition in this RFP constitute grounds for a claim after contract award.

### **4. Language**

- a. Proposal Responses shall be in clear, concise language. This is defined as easy-to-understand, non-technical information unless describing technology and/or architecture requirements.

- b. Whenever the terms “shall”, “must”, “will”, or “is required” are used in this RFP, the specification being referred to is mandatory for this RFP. Failure to meet any mandatory specification may cause rejection of the Bidder’s Proposal.
- c. Whenever the terms “expected,” “can,” “may,” or “should” are used in this RFP, the specification being referred to is a desirable item and failure to provide any item so termed will not be cause for rejection.

## 5. Bid Change

- a. If the Bidder needs to change a submitted Bid prior to the RFP Closing Date and Time, a new Bid shall be submitted to the OMES with the following statement: “This Bid supersedes the Bid previously submitted” in a single envelope, package, or container and shall be sealed.
- b. The name and address of the Bidder shall be inserted in the upper left corner of the single envelope, package, or container. The RFP number and RFP closing date and time must appear on the face of the single envelope, package, or container.
- c. The new Bid must be delivered before or by the RFP Closing Date and Time. If the new Bid does not arrive by this date and time, the previous Bid will be used for evaluation.
- d. No changes to a Bidder’s Bid will be accepted after the RFP Closing Date and Time.

## 6. Proposal Response Requirements

- a. All proposal responses must be submitted to the contract officer identified in Section B. Scope of Work.
  - i. Contract Officer: Sheri Diehm
- b. The font shall be Times New Roman, and the type size shall not be smaller than 12 point. The top, bottom, left and right margins shall be at least one inch, excluding headers and footers. All pages must be numbered.
- c. The Bidder shall not submit any items other than those requested in the Attachments/forms. If the Bidder submits marketing material, illustrations, extra pages or narrative, etc., the Proposal may be considered non-responsive. The additional information will not be considered in the evaluation.
- d. All Bids shall be submitted as follows:
  - i. One (1) Flash Drive and one (1) CD containing an electronic copy of the proposal. The Flash Drive and the CD must be clearly marked with the Bidder’s name, RFP number and date of RFP closing. Use of a tag for this information is acceptable.
  - ii. One (1) hard copy of the full proposal response, marked “ORIGINAL” and fourteen (14) copies, of Section Four of the proposal, below-

- Technical Response marked “COPY”. If there are discrepancies between submitted copies, the copy marked “Original” will take precedence.
- iii. Responses must be submitted on the forms provided, where applicable. Where a form is not provided, responses must be submitted in MS Word format (.doc or .docx).
  - iv. Each Bidder shall submit a complete proposal and should clearly describe the Bidder’s ability to meet or exceed every requirement detailed in Section B. Scope of Work by filling out the RFP Attachments.
  - v. Proposals should be tabbed and organized in a way that is clear and mirrors the organization described below in Section C.6.e.
  - vi. Each Section, as listed, should be organized within a separate folder on the Flash Drive and CD.
- e. The RFP documents that are required to be completed by the Bidder and returned in the Bidder’s proposal response are as follows:
- i. Section One – Administrative Documents
    1. Completed “Responding Bidder Information” OMES-FORM-076
    2. Completed “Certification for Competitive Bid and Contract” OMES-FORM-004
    3. Signed Amendments, if applicable
    4. Any exceptions to RFP terms and conditions.
  - ii. Section Two – References
    1. References must be submitted using Attachment H – References in accordance with the Instructions on the front page of the form. It is the responsibility of the Bidder to collect references from their customers. All references should be signed and clearly list the contact information of the responding customer.
    2. Bidder will submit **at least one (1) but no more than** three (3) references where the proposed Care Management solution is currently in use.
    3. Bidder will submit resumes for key staff proposed in accordance with Section B – Scope of Work, Table 4. **Staff must meet staffing requirements listed in Section B.8.c – Staffing.**
  - iii. Section Three – Financial Viability
    1. Bidder will include a copy of their certified financial statements for the previous year as a part of their Bid.
    2. Bidder must disclose any and all judgements, pending litigation or other potential financial reversals which might materially affect the viability or stability of the Bidder’s organization, or certify that no such condition is known to exist at the time of submission.

3. The State reserves the right to request reports on financial stability from independent financial rating services in order to further substantiate financial viability.
- iv. Section Four – Technical Response
1. Bidders shall submit a completed response to Attachment B – Technical Narrative Questions as follows:
    - a. Attachment B. shall be limited to 150 pages if the Bidder is not responding to the Value Added Services;
    - b. Attachment B. shall be limited to 155 pages if the Bidder is responding to the Value Added Services;
    - c. Pages submitted in excess of this limitation will not be evaluated;
  2. Attachment C. Specifications
    - a. Format
      - i. Must be submitted as a spreadsheet, in its original and unaltered format, other than as necessary to complete the response sections of the Attachment;
      - ii. PDF and other alternate formats will not be accepted;
    - b. Content
      - i. No alterations to the specifications listed in Attachment C will be accepted;
      - ii. Attachment C includes system requirements. Bidders shall indicate if the requirement is available in the existing proposed system now. If the Bidder indicates the system does not include a requirement(s), the proposal will not be rejected. The requirements will be scored on a weighted scale based on the existing capabilities, but all requirements shall be mandatory and will have to be delivered at implementation.
- v. Section Five – Pricing
1. Attachment G. Pricing Sheets shall be submitted in accordance with the instructions in the Pricing Sheets workbook. Attachment G must be submitted as a spreadsheet, in its original and unaltered format, other than as necessary to complete the response sections of the Attachment. PDF and other alternate formats will not be accepted. No alterations to the pricing format will be accepted.
  2. All costs submitted shall be firm, fixed prices and represent the total cost to complete the Scope of Work as described in Section



B.5 of the proposal. Attachment G – Pricing consists of an instructions tab and 10 schedule tabs. The instructions should be read closely and followed precisely and all schedule tabs should be completed in order to provide a competitive response to the RFP.

- vi. Section Six – EITA Compliance
  - 1. Provide adequate information defining your products' level of EITA compliance by providing a Voluntary Product Accessibility Template (VPAT) that indicates compliance of all products offered with the provisions of Section 508 of the Rehabilitation Act Amendments included in the Workforce Investment Act of 1998. Please complete the applicable VPAT & Accessibility - OMES Form. Attached for reference is the VPAT Instructions Template, Attachment I.
  - 2. Bidder may provide a URL link to a website providing VPAT for products deliverables.
- vii. Section Seven - OMES Security Certification & Accreditation Assessment
  - 1. Provide a completed copy of the Attachment K – OMES Security Certification & Accreditation Assessment in accordance with the State of Oklahoma Security Policy, which can be found at <http://www.ok.gov/cio/documents/InfoSecPPG.pdf>.
- f. It is the responsibility of the Bidder to ensure that all RFP documents are completed and received by OHCA. Bidders shall use the Attachments and forms provided to submit the requested information. Failure to provide a complete response utilizing the provided Attachments and forms may lead to disqualification or an unfavorable evaluation.