

# NEW MEXICO HUMAN SERVICES DEPARTMENT

## REQUEST FOR PROPOSALS

### HEALTH AND HUMAN SERVICES 2020 – Consolidated Customer Service Center



**RFP#19-630-4000-0001**

### **Amendment 2**

RFP Release: November 12, 2018

*Change From:* Proposals Due: February 13, 2019

*Change To :* Proposals Due: February 27, 2019

*Request for Proposals # 19-630-4000-0001 is amended as described herein:*

## **1. Changes to Section II Conditions Governing the Procurement, A. Sequence of Events – A. SEQUENCE OF EVENTS, page 15**

**Brief Description:** Replaced the sequence of events schedule to extend the due date for the submission of proposals and extended dates that are impacted by that extension.

*Change From:*

### **II. CONDITIONS GOVERNING THE PROCUREMENT**

This section of the RFP presents the schedule, description and conditions governing the procurement.

#### **A. SEQUENCE OF EVENTS**

The Procurement Manager will make every effort to adhere to the following schedule:

<b>Action</b>	<b>Responsible Party</b>	<b>Due Date*</b>
1. Issue RFP	HSD	November 12, 2018
2. Distribution List Confirmation	HSD	December 5, 2018
3. Pre-proposal Conference	HSD	December 5, 2018
4. Deadline to Submit Questions	Potential Offerors	December 7, 2018
5. Response to Written Questions	Procurement Manager	January 4, 2018
6. Submission of Proposal	Potential Offerors	February 13, 2019
7. Proposal Evaluation	Evaluation Committee	February 14, 2019 to February 26, 2019
8. Selection of Finalists	Evaluation Committee	February 27, 2019
9. Best and Final Offer	Finalist Offerors	March 13, 2019
10. Oral Presentation(s)	Finalist Offerors	March 20, 2019 to March 22, 2019
11. Finalize Contractual Agreement	HSD/Finalist Offerors	April 22, 2019
12. Approval of Contract (Federal & State)	CMS/DoIT	June 20, 2019
13. Contract Award	HSD/Finalist Offerors	June 24, 2019
14. Protest Deadline	HSD	15 calendar days after contract award notice

\* Dates subject to change based on number of responses and final approval from Federal partners.

To:

## II. CONDITIONS GOVERNING THE PROCUREMENT

This section of the RFP presents the schedule, description and conditions governing the procurement.

### B. SEQUENCE OF EVENTS

The Procurement Manager will make every effort to adhere to the following schedule:

Action	Responsible Party	Due Date*
1. Issue RFP	HSD	November 12, 2018
2. Distribution List Confirmation	HSD	December 5, 2018
3. Pre-proposal Conference	HSD	December 5, 2018
4. Deadline to Submit Questions	Potential Offerors	December 7, 2018
5. Response to Written Questions	Procurement Manager	January 14, 2019
6. Submission of Proposal	Potential Offerors	February 27, 2019
7. Proposal Evaluation	Evaluation Committee	February 28, 2019 to March 13, 2019
8. Selection of Finalists	Evaluation Committee	March 14, 2019
9. Best and Final Offer	Finalist Offerors	March 21, 2019
10. Oral Presentation(s)	Finalist Offerors	April 2, 2019 to April 4, 2019
11. Finalize Contractual Agreement	HSD/Finalist Offerors	May 3, 2019
12. Approval of Contract (Federal & State)	CMS/DoIT	July 24, 2019
13. Contract Award	HSD/Finalist Offerors	July 31, 2019
14. Protest Deadline	HSD	15 calendar days after contract award notice

\* Dates subject to change based on number of responses and final approval from Federal partners.

## 2. Changes to 7. Project Management, 7.4 Additional CCSC Key Personnel Requirements, page 76

**Brief Description:** Replaced section 7.6 in 7.4 Additional CCSC Key Personnel Requirements, changing the key personnel commitment.

**Change From:**

### 7.4. Additional CCSC Key Personnel Requirements

Offeror must propose staff that meet the following requirements:

1. The Project Manager must be an employee of the Contractor at the time Offeror submits a proposal in response to this RFP;
2. All other Key Personnel included in Offeror's proposal must be current employees of the Offeror or of its identified subcontractor(s) or must have a signed statement of commitment from the individual to join the Offeror's organization not later than the planned contract start date;
3. All Key Personnel must be committed for no less than the first six (6) months of the contract performance period;
4. Contractor must request no substitutions of Key Personnel within the first sixty (60) days of the contract unless such substitutions are made at HSD request or they are necessary due to sudden illness, death, resignation or other reasons that HSD may or may not approve; and
5. Changes to proposed Key Personnel positions, staff and responsibilities are allowed only with prior written permission from HSD.

While the Contractor must make every effort to maintain a stable Key Personnel team for contract duration, Offeror must acknowledge that HSD has the right to refuse any replacement, substitution or reassignment of duties for Key Personnel. Prior to making any such changes, the Contractor must obtain written approval of the change from HSD. In all instances, qualifications of replacement staff must be comparable to or better than those of the individual that is being replaced or whose duties are being reassigned.

HSD retains the right to approve or disapprove proposed staffing and to require the Contractor to replace specified Contractor employees or those of subcontractors. All Contractor staff and the staff of subcontractors must perform their work in the United States; no off-shoring of any work under this contract is allowed.

HSD retains the right to ask that any Contractor staff be removed from the Project.

*To:*

#### **7.4. Additional CCSC Key Personnel Requirements**

Offeror must propose staff that meet the following requirements:

1. The Project Manager must be an employee of the Contractor at the time Offeror submits a proposal in response to this RFP;
2. All other Key Personnel included in Offeror's proposal must be current employees of the Offeror or of its identified subcontractor(s) or must have a signed statement of commitment from the individual to join the Offeror's organization not later than the planned contract start date;
3. All Key Personnel must be committed for no less than the first twelve (12) months of the contract performance period;

4. Contractor must request no substitutions of Key Personnel within the first sixty (60) days of the contract unless such substitutions are made at HSD request or they are necessary due to sudden illness, death, resignation or other reasons that HSD may or may not approve; and
5. Changes to proposed Key Personnel positions, staff and responsibilities are allowed only with prior written permission from HSD.

While the Contractor must make every effort to maintain a stable Key Personnel team for contract duration, Offeror must acknowledge that HSD has the right to refuse any replacement, substitution or reassignment of duties for Key Personnel. Prior to making any such changes, the Contractor must obtain written approval of the change from HSD. In all instances, qualifications of replacement staff must be comparable to or better than those of the individual that is being replaced or whose duties are being reassigned.

HSD retains the right to approve or disapprove proposed staffing and to require the Contractor to replace specified Contractor employees or those of subcontractors. All Contractor staff and the staff of subcontractors must perform their work in the United States; no off-shoring of any work under this contract is allowed.

HSD retains the right to ask that any Contractor staff be removed from the Project.

### 3. Changes to Appendix J – Crosswalk BMS RFP to CMS Draft RFP Template, page 179

**Brief Description:** Replaced Crosswalk BMS with CCSC Crosswalk.

*Change From:*

#### **APPENDIX J - Crosswalk BMS RFP to CMS Draft RFP Template**

CMS has provided guidance on the Medicaid Enterprise Certification Toolkit (MECT) including “CMS Uniform RFP Guide, Version 4.2” and has allowed for variation in RFP creation. As NM State Procurements were in process at the time the guidance was provided this RFP is a variation and does not follow the Uniform RFP but does include all the sections of the MMIS Uniform RFP Guide that can be found in the Procurement Library. The table below reflects each section of the Uniform RFP Guide and where the section is addressed in this BMS RFP. It is expected each vendor will review the Uniform RFP Guide in addition to reviewing this mapping.

#	Uniform RFP Guide	IP RFP Section # and Section Title
1	State Procurement Objectives	INTRODUCTION PURPOSE OF THIS REQUEST FOR PROPOSALS  Addendum 20- HHS 2020 Vision and Architecture, HHS MMISR PROJECT VISION  Addendum 2 – HHS 2020 Background Information NM HHS and Medicaid, BACKGROUND INFORMATION – Business Objectives  APPENDIX G - DETAILED STATEMENT OF WORK
a	State Vision	Addendum 20- HHS 2020 Vision and Architecture, HUMAN SERVICES DEPARTMENT VISION  Addendum 2 – HHS 2020 Background Information NM HSD and Medicaid, HHS MMISR PROJECT VISION  II. MMISR APPROACH  APPENDIX G - DETAILED STATEMENT OF WORK
b	Business Objectives	Addendum 2 – HHS 2020 Background Information NM HHS and Medicaid, BACKGROUND INFORMATION – Business Objectives

#	Uniform RFP Guide	IP RFP Section # and Section Title
		APPENDIX H - OFFEROR AND CONTRACTOR REQUIREMENTS
2	Technology Standards	<p>II. MMISR APPROACH</p> <p>Addendum 20- HHS 2020 Vision and Architecture, HHS 2020 Enterprise Architecture</p> <p>APPENDIX H - OFFEROR AND CONTRACTOR REQUIREMENTS</p>
a	CMS Requirements [Align with Seven Conditions and Standards]	<p>Addendum 20- HHS Vision and Architecture, HHS MMISR PROJECT VISION</p> <p>APPENDIX G - DETAILED STATEMENT OF WORK</p>
	1) Modularity Standard	<p>Addendum 20- HHS Vision and Architecture, HHS MMISR PROJECT VISION</p> <p>Addendum 20- HHS Vision and Architecture, HUMAN SERVICES DEPARTMENT VISION</p> <p>II. MMISR APPROACH</p>
	2) MITA Condition	<p>APPENDIX G – DETAILED STATEMENT OF WORK</p> <p>APPENDIX H - OFFEROR AND CONTRACTOR REQUIREMENTS</p>
	3) Industry Standards Condition	<p>II. MMISR APPROACH</p> <p>Addendum 20- HHS Vision and Architecture, HHS 2020 Enterprise Architecture</p> <p>Addendum 20- HHS Vision and Architecture, HUMAN SERVICES DEPARTMENT VISION</p> <p>APPENDIX G - DETAILED STATEMENT OF WORK</p>
	4) Leverage Condition	n/a for a BPO
	5) Business Rules Condition	<p>Addendum 20- HHS Vision and Architecture, HUMAN SERVICES DEPARTMENT VISION</p> <p>II. MMIS APPROACH, A. The MMISR Modules and Services Procurements</p> <p>APPENDIX H - OFFEROR AND CONTRACTOR REQUIREMENTS</p>
	6) Reporting Condition	APPENDIX G - DETAILED STATEMENT OF WORK

#	Uniform RFP Guide	IP RFP Section # and Section Title
		APPENDIX H OFFEROR AND CONTRACTOR REQUIREMENTS
	7) Interoperability Condition	Addendum 20- HHS Vision and Architecture, HHS MMISR PROJECT VISION  APPENDIX G - DETAILED STATEMENT OF WORK
b	State Technology Requirements [Optional]	n/a for a BPO
3	Scope of Work	III. CONTRACTOR ROLE  APPENDIX G - DETAILED STATEMENT OF WORK  APPENDIX H - OFFEROR AND CONTRACTOR REQUIREMENTS
	System Integrator Considerations	n/a for BMS, addressed in SI RFP
4	Cost Module and Budgeting Specifications	VII. RESPONSE SPECIFICATIONS A. COST - Offerors must complete the Cost Response as noted in APPENDIX B.  APPENDIX B – COST RESPONSE FORM
	System Integrator Considerations	n/a for BMS, addressed in SI RFP
5	Project Management and Governance	Addendum 20- HHS Vision and Architecture, HUMAN SERVICES DEPARTMENT VISION  Addendum 19 – HHS 2020 Organizational Chart, HHS 2020 STATE PROJECT MANAGEMENT OFFICE (PMO)  APPENDIX H - OFFEROR AND CONTRACTOR REQUIREMENTS
	System Integrator Considerations	n/a for BMS, addressed in SI RFP
a	State Project Governance	APPENDIX H - OFFEROR AND CONTRACTOR REQUIREMENTS
b	Vendor Project Management	n/a for a BPO
6	Key Personnel	APPENDIX G - DETAILED STATEMENT OF WORK  APPENDIX H - OFFEROR AND CONTRACTOR REQUIREMENTS
	System Integrator Considerations	n/a for BMS, addressed in SI RFP
7	Project Performance Standards	APPENDIX G - DETAILED STATEMENT OF WORK



#	Uniform RFP Guide	IP RFP Section # and Section Title
		<p>APPENDIX H - OFFEROR AND CONTRACTOR REQUIREMENTS</p> <p>Appendix K - HHS 2020 BMS Performance Measures</p>
	System Integrator Considerations	n/a for BMS, addressed in SI RFP
8	Contract Standards	APPENDIX I - SAMPLE CONTRACT
	<input type="checkbox"/> Statement of contract termination procedures;	APPENDIX I - SAMPLE CONTRACT
	<input type="checkbox"/> Statement that the prime contractor is responsible for contract performance, whether or not subcontractors are used;	<p>VI. CONDITIONS GOVERNING THE PROCUREMENT,</p> <p>C. GENERAL REQUIREMENTS</p> <p>4. Subcontractors/Consent</p>
	<input type="checkbox"/> Requirement for a statement of corporate financial stability and/or for a performance bond; and	<p>VII. RESPONSE SPECIFICATIONS, B. OTHER REQUIREMENTS</p> <p>3. Financial Stability Documents</p> <p>4. Performance Bond Capacity Statement</p>
	Statement that the proposed contract will include provisions for retention of all ownership rights to the software by the State, if designed, developed, installed, or enhanced with FFP. (See 42 CFR 433.112 (b)(5) and (6), and 45 CFR 95.617(a)).	APPENDIX H - OFFEROR AND CONTRACTOR REQUIREMENTS
9	State Procurement Process	<p>B. MMISR PROCUREMENT LIBRARY</p> <p>VI. CONDITIONS GOVERNING THE PROCUREMENT</p> <p>VI B 7. Proposal Evaluation</p>
a	CMS Language	<p>V. MMISR PROCUREMENT LIBRARY</p> <p>VI. CONDITIONS GOVERNING THE PROCUREMENT</p> <p>VI B 7. Proposal Evaluation</p>
	As outlined in Section 2, Chapter 11 of the State Medicaid Manual include the following items: – Listing and description of the reference material available to the contractor for use in preparation of proposals and/or in performance of the contract;	V. MMISR PROCUREMENT LIBRARY

#	Uniform RFP Guide	IP RFP Section # and Section Title
	– Standard format and organization for the proposals including both work to be performed and cost statements; and	VI. CONDITIONS GOVERNING THE PROCUREMENT
	– Explanation of the proposal evaluation criteria and the relative importance of cost or price, technical, and other factors for purposes of proposal evaluation and contract award.	VI B 7. Proposal Evaluation

**To:**

**APPENDIX J - Crosswalk CCSC RFP to CMS Draft RFP Template**

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	4) Leverage Condition	n/a for a BPO
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	System Integrator Considerations	n/a for CCSC, addressed in SI RFP
a	State Project Governance	APPENDIX H - OFFEROR AND CONTRACTOR REQUIREMENTS
b	Vendor Project Management	n/a for a BPO
6	Key Personnel	APPENDIX G - DETAILED STATEMENT OF WORK

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		APPENDIX H - OFFEROR AND CONTRACTOR REQUIREMENTS
	System Integrator Considerations	n/a for CCSC, addressed in SI RFP
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	<input type="checkbox"/> Requirement for a statement of corporate financial stability and/or for a performance bond; and	VII. RESPONSE SPECIFICATIONS, B. OTHER REQUIREMENTS  3. Financial Stability Documents 4. Performance Bond Capacity Statement
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#	Uniform RFP Guide	IP RFP Section # and Section Title
a	CMS Language	V. MMISR PROCUREMENT LIBRARY  VI. CONDITIONS GOVERNING THE PROCUREMENT  VI B 7. Proposal Evaluation
	As outlined in Section 2, Chapter 11 of the State Medicaid Manual include the following items: – Listing and description of the reference material available to the contractor for use in preparation of proposals and/or in performance of the contract;	V. MMISR PROCUREMENT LIBRARY
	– Standard format and organization for the proposals including both work to be performed and cost statements; and	VI. CONDITIONS GOVERNING THE PROCUREMENT
	– Explanation of the proposal evaluation criteria and the relative importance of cost or price, technical, and other factors for purposes of proposal evaluation and contract award.	VI B 7. Proposal Evaluation