

STATE OF OREGON



Oregon Health Authority (OHA)
Division of Health Policy and Analytics

HEALTH SERVICES RESEARCH

REQUEST FOR PROPOSAL (RFP) 4150 (ORPIN OPPORTUNITY #OHA-4150-16)

Date of Issue: March 9, 2016
Closing Date: April 14, 3:00 PM (Pacific Time)

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GENERAL INFORMATION

INTRODUCTION

The State of Oregon Health Authority (OHA) requests Proposals from qualified individuals or firms hereinafter "Proposers," to prepare a comprehensive assessment of four options for financing health care delivery in Oregon for consideration by the Legislature, Oregon policy makers and stakeholders. The purpose of the study, as mandated by the Oregon legislature, is to model different health reform models to the State's existing health insurance system to promote quality, affordable, and comprehensive coverage for all Oregonians.

In June 2015, the 78th Oregon Legislative Assembly passed House Bill 2828, which requires the Oregon Health Authority (OHA) to commission an independent study of different financing models for health care and requires OHA to report to the Legislative Assembly by November 30, 2016. Pursuant to the legislation, OHA is issuing this Request for Proposal (RFP) to commission the independent study. The final report will provide comprehensive recommendations to the 2017 Legislature on the best option for health care financing and delivery in Oregon (per HB 3260, 2013 session).

The purpose of the RFP is to develop a series of analyses and a comprehensive report that will enable Oregon policy makers to assess a range of financing options for health care delivery that meet a number of important policy goals and objectives as identified by the Legislative Assembly. The report must also include a recommendation for the option for health care delivery and financing that best satisfies maximizing available federal funding and ensures that health care providers receive adequate compensation for providing health care.

The required content of the study are described in Section 2.3 Scope of Work.

OHA expects to award a single Contract from this RFP. Single RFP responses will be given preference in the evaluation process. Proposers wishing to subcontract a portion of the Work shall arrange appropriate, high-quality subcontractor arrangements for the other portions of the work and indicate how the subcontractors' results will be integrated with other study components included in the Section 2.

OHA expects to award a single Contract for the period of approximately **May 1, 2016** through **November 1, 2016**, with Contract not to exceed \$434,000, the amount to be negotiated during the contracting phase with Proposer awarded the Contract.

All persons or firms submitting Proposals are referred to as Proposers in this Request for Proposals (RFP); after execution of the Contract, the awarded Proposer will be designated as Contractor.

The scope of the Contractor services and deliverables for the Contract is described in more detail in Section 2.3 Scope of Work. OHA will negotiate the final Statement of Work to be included in the Contract with the highest ranked Proposer.

SCHEDULE

The table below represents a tentative schedule of events. All times are listed in Pacific Time. All dates listed are subject to change. N/A denotes that event is not applicable to this RFP.

Event	Date	Time
Questions / Requests for Clarification Due	March 23 , 2016	3:00 PM
Answers to Questions / Requests for Clarification Issued (approx.)	March 25, 2016	
RFP Protest Period Ends	April 4, 2016	3:00 PM
Closing (Proposals Due)	April 14, 2016	3:00 PM
Opening of Proposals	April 14, 2016	3:15 PM
Issuance of Notice of Intent to Award (approx.)	April 29, 2016	
Award Protest Period Ends	7 days after Notice of Intent to Award	

SINGLE POINT OF CONTACT (SPC)

The SPC for this RFP is identified on the Cover Page, along with the SPC's contact information. Proposer shall direct all communications related to any provision of the RFP, whether about the technical requirements of the RFP, contractual requirements, the RFP process, or any other provision only to the SPC.

AUTHORITY, OVERVIEW, AND SCOPE

AUTHORITY AND METHOD

Agency is issuing this RFP under the authority of ORS 413.033.

Agency is using the Competitive Sealed Proposals method, pursuant to ORS 279B.060 and OAR 125-247-0260. Agency may use a combination of the methods for Competitive Sealed Proposals, including optional procedures:

a) Competitive Range; b) Discussions and Revised Proposals; c) Revised

Rounds of Negotiations; d) Negotiations; e) Best and Final Offers; and f) Multistep Sealed Proposals.

DEFINITION OF TERMS

For the purposes of this RFP, capitalized words will refer to the following definitions.

General Definitions

Capitalized terms not specifically defined in this document are defined in [OAR 125-246-0110](#).

Contract means the Contract awarded as a result of this RFP.

Contractor means the Proposer or Proposers selected through this RFP to enter into a Contract with OHA to perform Work as described in this RFP.

Options means the four options for financing health care delivery service in Oregon as listed in Appendix 1, attached hereto as specified in [HB 3260, Section \(2\) \(2013\)](#).

Key Persons or **Key Personnel** means the person or persons on Proposer's staff, and any or subcontractors, to be assigned to perform the Work under the Contract.

OC&P or **OCP** means the Office of Contracts and Procurement, the entity that is responsible for the procurement process for OHA.

Governmental Proposal means a Proposal submitted to OHA by a Governmental Proposer.

Governmental Proposer means a governmental entity that submits a Proposal.

Proposal means a competitive offer, binding on the Proposer and submitted in response to this Request for Proposals.

Proposer means an entity or person that submits a Proposal in response to this Request for Proposals.

RFP means Request for Proposals.

Project Specific Definitions

HB 2828 refers to House Bill 2828 approved by the 2015 Oregon Legislature.

SCOPE OF WORK

Pursuant to ORS 279B.060 (2)(c), OHA requires the Contractor to meet the highest standards prevalent in the industry or business most closely involved in providing the appropriate goods or services.

Requirements and Deliverables

Under the Contract resulting from this RFP, Contractor shall perform the following Work.

Contractor shall perform all Work in a timely fashion in order to meet OHA deadlines for submitting a report to the Oregon Legislature in November of 2016.

Contract shall perform a study that includes a series of analyses and reports that will enable Oregon policymakers to assess the best option(s) for health care financing and delivery in Oregon. Specifically, Contractor's study shall examine four different, complex financing and coverage options as specified in [HB 3260 \(2013\)](#). Specifically the study shall include:

- Evaluation of the four different financing options using a set of criteria as specified by HB 3260 (2013);
- Assessment of options for health care financing by a government agency, by commercial insurance and by a combination of both government and commercial insurance;
- Review of previous studies conducted by other states that explore alternative models of health care financing or delivery.
- Review of how the different models would impact Oregon's current health care reform efforts;
- Review of impact on and interplay of each option on the federal Affordable Care Act (ACA), Employee Retirement Income Security Act of 1974 (ERISA), and Titles XVIII, XIX, and XXI of the Social Security Act.; and
- Analysis of:
 - 1) cost and impact of implementing each option on a) existing commercial insurance and publicly funded health plans and care systems; b) individuals and businesses; and c) the overall economy of the state; and
 - 2) potential savings of implementing each option for local and state government agencies.

Requirements and Deliverables

Contractor's analysis shall assess the major factors that Oregon needs to consider in determining which of the four different Options would best meet the criteria specified in HB 3260 including flexibilities, advantages, costs, savings or challenges that would make each option more or less attractive to Oregon.

Contractor shall incorporate Oregon-specific data into their model(s), using publicly-available national data, and/or datasets developed “in-house” by OHA.

Note: OHA will support the Contractor in obtaining data from OHA, Department of Consumer and Business Services (DCBS), Employment Department, among other relevant state agencies as needed to support the project. This will likely include summary reports on expenditures and enrollment data from OHA’s All-Payer All-Claims database, as well as other supplemental data sources (e.g. American Community Survey, Medical Expenditure Panel Survey).

Pursuant to HB 3260, Contractor shall “examine at least four options,” as briefly summarized below.

A. Single-payer: a publicly financed single-payer model for privately delivered health care decoupled from employment that only allows commercial insurance coverage of supplemental health services not paid for under the option.

B. Health Care for All: a commercial coverage option that provides the essential health benefits (EHBs) and operates in an alternative, exchange-like market that could serve all Oregonians in place of other public coverage programs, and leverages federal funding.

C. Alternative Marketplace: model that allows individuals to choose between a publicly funded plan, including a basic health program (BHP), and private insurance coverage, and allows for fair and robust competition between public and private insurance.

D. Affordable Care Act (ACA): the current health care financing system in the state that includes CCOs, the health insurance marketplace, and full implementation of the ACA.

See [Appendix 1: Financing Model Options](#), attached hereto.

In addition Contractor shall utilize a dynamic simulation model (e.g. micro-simulation model) to:

- analyze the impact of the broad-based health reform proposals listed above;
- to estimate the potential behavioral and economic effects on individuals, households, employers, as well as government; and
- to help understand the likely effects of the reform models in terms of impacts on insurance coverage and cost at the state level.

Proposed Financing Options (See [Appendix 1: Financing Model Options](#), attached hereto.)

In 2013, the Legislative Assembly passed HB 3216. The legislation outlines the four different health care financing Options as described above. The legislation also identifies a set of criteria for assessing which Option would be more or less likely to result in an equitable and quality health care system for Oregonians. The four different Options that will be modeled for financing health care delivery in Oregon, will need to be research-based and individually assessed based on the criteria below.

- a) Provides universal access to comprehensive care at the appropriate time.
- b) Ensures transparency and accountability.
- c) Enhances primary care.
- d) Allows the choice of health care provider.
- e) Respects the primacy of the patient-provider relationship.
- f) Provides for continuous improvement of health care quality and safety.
- g) Reduces administrative costs.
- h) Has financing that is sufficient, fair and sustainable.
- i) Ensures adequate compensation of health care providers.
- j) Incorporates community-based systems.
- k) Includes effective cost controls.
- l) Provides universal access to care even if the person is outside of Oregon.
- m) Provides seamless birth-to-death access to care.
- n) Minimizes medical errors.
- o) Focuses on preventative health care.
- p) Integrates physical, dental, vision and mental health care.
- q) Includes long term care.
- r) Provides equitable access to health care, according to a person's needs.
- s) Affordable for individuals, families, businesses and society.

Selected Contractor shall try to limit variations in assumptions in estimating the Options' costs and financing in an effort to ease comparability across the four Options.

2.3.3. Tasks and Deliverables

The primary goal of the comprehensive study is to prepare a comprehensive assessment of four different financing Options in Oregon including potential policy options for consideration by Oregon policy makers, stakeholders, and the public. Contractor shall work closely with the OHA to complete the following tasks and produce a set of deliverables.

Work to be performed under the Contract awarded through this RFP includes four primary service components: Research and Data Analysis, Report Writing, Preparing Recommendations, and Presentations. OHA reserves the right to negotiate a timeline related to these services, but reports and presentation materials must be completed and approved by OHA prior to delivery. The following are the estimated completion dates for activities required within this scope of work:

- Research and Analysis: completed by August 1, 2016.
- Preliminary Full Report: completed by September 30, 2016.
- Full Report with comprehensive recommendations: completed by October 31st, 2016.
- Presentation materials: completed by October 31, 2016.

Requirements for Deliverables

Contractor's study shall assess the major factors that the Oregon Legislature needs to employ to determine which of the four financing Options are most effective in meeting the specific criteria and will result in coverage and access to comprehensive health services for Oregonians. The purpose of the study is to provide the legislature with information about different Options that will support an optimal health care delivery and financing system in Oregon compared to the existing system (*see Option D in [Appendix 1, attached hereto](#)*).

Contractor shall incorporate Oregon-specific data into its analysis including publicly-available datasets, including datasets specific and unique to Oregon. Contractor work under each task will be initiated through the collaborative development of a Work Plan. The Work Plan will be refined through an iterative process with input from both OHA and Contractor. Contractor's final Work Plan will be subject to OHA review and acceptance.

Required Description and Analysis for Each Financing Option

Principal Considerations: The following is a list of principal considerations that must be incorporated, addressed, and supported by Contractor in the analyses, studies, and Work Papers described in this Statement of Work in order to meet the requirements of HB 3216:

1. Size and demographic characteristics of populations that would be eligible to enroll in each of the four options including coverage type, as well as the remaining uninsured.
2. Federal funds available under each financing Option.
3. State expenses and administrative costs to operate the four separate financing Options to the extent applicable.
4. Impact of each Option on the number of individuals enrolled in Medicare, Medicaid, Marketplace, employer-sponsored insurance, and other various insurance programs in Oregon as of 2015.
5. Impact of three of the options on the rates at which individuals with incomes above and below 400 percent of the federal poverty guidelines gain or lose health insurance coverage compared to rates for the ACA option.
6. Extent to which individuals would be expected to between 2017-2020:

- a. Cycle in and out of coverage due to changes in income; and
 - b. Maintain continuity of coverage and care.
7. Premium and out-of-pocket costs of health care to individuals per each model.
8. Impact of the Basic Health Program on premiums charged in the private insurance market in the second model (referred to as the Alternative Marketplace).
9. For each Option, impact on and interplay with each of the following:
 - a. Federal Affordable Care Act (ACA)
 - b. Employee Retirement Income Security Act of 1974; and
 - c. Titles XVIII, XIX, and XXI of the Social Security Act
10. Health benefit packages, including packages that mirror the medical assistance program (i.e., Medicaid) benefit package and the essential health benefits package adopted by the State's Marketplace(2017 Standard Benchmark Plan), and Public Employees' Benefit Board (PEBB) and Oregon Educators Benefit Board (OEGB).
11. Different provider reimbursement rates (*see Appendix 1: Financing Model Options, attached hereto*).

For each Option, the Contractor will need to analyze and summarize the following factors. The factors below will be used as to compare Options A-C to Option D - the ACA option, which will serve as the baseline. The narrative description must provide information about the overall program design and highlight key implementation considerations that Oregon would need to assess prior to being considered by the Legislative Assembly.

1. Description and key modeling assumptions
2. Governance and organization of financing and delivery of health services
3. Estimates of the total number and group of individuals eligible for and likely to enroll in each option
4. Consumer affordability in terms of out-of-pocket expenditures (e.g. premiums, co-pays, deductibles, etc.) for individuals and families
5. Description and analysis of financing and revenue mechanisms
6. Description of defined benefit packages
7. Analysis and estimate of provider payment and reimbursement mechanism(s) applied to the financing model
8. Budget and cost containment mechanisms
9. Waiver requirements, if applicable

Lastly, for each Option, the Contractor shall estimate the total system impacts. Specifically, Contractor shall estimate aggregate impact among employers and employees (private and public) including forecasted changes in wages and income; impact at the individual household level in terms of personal income and percentage of income spent on health care. Specifically, Contractor shall estimate impacts among employers, providers, households, and individuals; aggregate and net economic on Oregon's economy including but not limited to impact on employers, employees (e.g. wages/income), federal and state funding including net change in tax revenues including payroll and sales tax. For each Option, Contractor shall

quantify and address advantages and disadvantages to Oregon employers from changes in payroll costs with respect to other states, potential impact on financing and long-term sustainability around funding of long-term care services, and potential savings from system efficiencies and to local and state agencies currently responsible for direct service delivery or funding services.

Task 1 - Detailed Description of the Financing Options to be Modeled: Methods and Data

After completing the econometric modeling and financial/actuarial analyses for each Option, Contractor shall compare a comparative assessment with respect to implementation considerations across the four models. For each option, to the extent possible, Contractor shall consider long-term issues including medical cost growth, future tax revenue, and forecasted increases in private and publicly funded health care expenditures through 2020. In addition, Contractor shall support each analysis with actuarial and econometric analysis that includes estimates based on different benefit designs, individual and employer behaviors, and tax revenue projections.

- Implementation of model Option A: Single-payer. For this model, Contractor shall determine the appropriate amount of funding needed for this model. It is likely that the model will include a range, including a lower and upper limit for setting a payroll, income and or/ sales tax to generate revenue to finance this particular model.
- Implementation of model Option B: Alternative Marketplace
- Implementation of model Option C: Health Care for All
- Implementation of model Option D: ACA (status quo)

See Appendix 1: Financing Model Options, attached hereto.

For Task 1, Contractor shall provide detailed description of the analytic plan and data sources that will be used to complete tasks 1-4 including how a microsimulation model as well as how multiple data sources will be integrated and used to complete the analysis of the individual models. This task also requires Contractor to identify key assumptions with the various Options, if more than one model is used.

Deliverable 1: Contractor shall prepare and deliver to the OHA Contract Administrator a written report describing in detail the four individual Options in Oregon, including supporting documentation and analyses regarding the rigor and soundness of the methodologies that will be used in the various analyses. This will include a written description of the analytic plan that will be deployed to compare and assess all four Options.

Project Timeline - Estimated Completion date: May 31, 2016

Task 2 - Modeling the Individual Financing Options

Each Option or “reform approach” has different distributional implications for government, employers, and individuals. Several of the Options could potentially expand coverage to more residents resulting in significant health, economic, and social benefits; however, broad based system reform will necessitate the state making difficult tradeoffs as the objectives of different stakeholders are balanced. Each component of a reform’s design carries trade-offs with regard to private versus public costs. For example, the greater the subsidization of coverage, the greater the level of public funding required, but the greater the potential for savings to households and employers.

For each option, Contractor shall model the different financing options and develop projections through 2020 and include the following:

- Evaluate the extent to which financing model option(s) in Appendix 1 satisfy(ies) the criteria describes in the principal consideration (1-11) and assessment criteria (A-S).
- Estimate the cost of implementation on the existing commercial insurance and publicly funded health care systems;
- Estimate the net fiscal impact of implementation on individuals and business including the tax implications;
- Assess the impact of implementation on the economy of this state;
- Estimate the potential savings to local governments and government agencies that currently administer health care programs, provide health care premium subsidies or provide funding for health care services.
- Maximize available federal funding; and
- Ensure health care providers receive adequate compensation for providing health care.

Deliverable 2: Contractor shall prepare and deliver to the OHA Contract Administrator a written assessment of different financial proposals. The written description must be supported by sound methodology and analytic approach to modeling the four options including detailed descriptions of any significant limitations.

Project Timeline - Estimated Completion date: July 31, 2016

Task 3 -Option Comparisons and Comprehensive Analysis

For Task 3, the Contractor shall complete a comprehensive comparison of the four different Options. The principal considerations listed above in “[Proposed Financing Options](#)” items a) – s) will serve as the key criteria for comparing the different financing Options.

Deliverable 3: Contractor shall prepare and deliver to the OHA Contract Administrator a written assessment and appropriate comparative tables to compare and contrast the different Options.

Project Timeline - Estimated Completion date: August 31, 2016

Task 4 - Implementation: Key Considerations and Implications

For Task 4, Contractor shall assess additional flexibilities, advantages, costs, savings or challenges to the State that would make the each option more or less attractive to Oregon. Upon OHA request, Contractor shall also identify future policy considerations that are beyond the scope specified in HB 3260. Contractor shall identify any federal constraints, federal restrictions, or additional federal authorities needed to implement each option, if applicable.

Task 4.1 Implementation Considerations

Contractor shall compare each implementation and operating costs and revenues using the three alternative Options A-C compared to the current ACA health financing system (option Model D) (see [Appendix 1: Financing Model Options](#) attached hereto):

- a. Estimate the annual revenue, costs, and state deficit/surplus of operating each financing approach.
- b. Estimate any cost-saving offsets that would accrue to the State or Oregon health care delivery system if each option were implemented, to the extent possible.
- c. Describe federal laws that would support or impede potential implementation of Options A-C . For example, ACA, ERISA, Title XIX of Social Security Act.

Task 4.2 Administrative Considerations

Contractor shall prepare a report on timeframes, business functions, and cost estimates associated with establishing and managing the different Option that addresses the following:

- a. Potential feasibility and costs of implementing each Option with existing organizational structures (i.e. OHA) and/or new organizational structures.
- b. Assessment of initial startup costs and ongoing annual administrative costs necessary to operate each option.

Task 4.3 Additional Considerations

In addition, if required in the Contract with OHA,¹ Contractor shall assess the following issues.

- a. Depending on the market share, Contractor shall assess whether the State of Oregon may be able to negotiate more or less

¹Section 4.3 b and c tasks are not explicitly required by HB 3260; so whether those tasks 3 are included in the Contract will depend on whether it is financially feasible for OHA to include them in light of available funding.

favorable payment rates with providers; thus potentially impacting the overall cost for health care services, with an emphasis on Financing Option A and B. This sub-task should include a range of potential savings. (See [Appendix #1 Financial Model Options](#), attached hereto).

- b. Contractor shall estimate the potential range of costs and any potential savings if long-term care services were included as an additional benefit to Financing Model Options A-C. (See [Appendix #1 Financial Model Options](#), attached hereto).
- c. Contractor shall address the potential overall impact in terms of overall costs with respect to defensive medicine as an additional factor.

Deliverable 4: Contractor shall prepare and deliver to the OHA Contract Administrator a written report that assesses the implementation considerations of each Financing Options A-C in Oregon, including supporting documentation, and addresses implementation options, policy considerations, and federal authorities and/or waivers that would be required to implement.

Project Timeline - Estimated Completion date: September 31, 2016

Tasks 5. Comprehensive Report and Recommendations

Contractor shall compile all information and analysis developed in Tasks 2 through 4 in a draft report to be submitted to the OHA no later than October 1, 2016. Contractor shall structure the draft report around each key element identified in HB 3260 (2013), and include a clear exposition of key assumptions underlying discussion and estimates for each design option, as well as for the baseline representing ACA implementation in Oregon. OHA staff will review and provide comments to the Contractor no later than October 17st, 2016. Contractor shall consider all comments received by that date, and prepare a revised final report responsive to those comments. In addition, Contractor's final report will include an appendix with full documentation of methods.

Contractor shall submit drafts of each deliverable to the OHA Contract Administrator for review and comment, and Contractor shall make appropriate revisions requested by OHA, prior to final delivery to, and acceptance by, OHA. Also, Contractor provide OHA all materials, reports and presentations prepared by Contractor under this Contract in formats acceptable to OHA, Contractor's materials, reports and presentations shall include all formulas involved in any calculations or modeling and written narratives explaining Contractor's findings and recommendations.

Contractor shall conduct Report Writing consisting of Preliminary Full Report, Final Full Report, Preliminary Executive Summary, and Final Executive Summary as described below. Report should provide a

comprehensive overview of Tasks 1-4 including recommendation requirements as outlined on page 3 (bill criteria) and page 6 (principal considerations).

5.1 Preliminary Full Report

Contractor shall prepare a written preliminary draft of the full report that OHA will submit to the Oregon Legislature in accordance with HB 3260. The preliminary draft report shall contain the report elements Tasks 1-4.

Project Timeline - Estimated Completion date: October 15th, 2016

5.2 Full Report

Contractor shall work with OHA in a collaborative manner to make the revisions and edits to the preliminary full report as necessary to produce a final report acceptable to OHA and suitable for presentation to the Oregon Legislature in response to HB 3260.

Project Timeline - Estimated Completion date: October 31st, 2016

5.3 Preliminary Executive Summary

Contractor shall prepare a written preliminary draft of the executive summary that OHA will submit to the Oregon Legislature in accordance with HB 3260. The preliminary draft executive summary shall summarize the report elements Tasks 1-4.

Project Timeline - Estimated Completion date: October 15th, 2016

5.4 Final Executive Summary

Contractor shall prepare an executive summary of the full report, which will provide key information to the Legislature including: Summary of the four financing Options modeled, methods used to model those Options, comprehensive assessment of the differences among the four Options, detailed description of implementation considerations, and recommendations , including opportunities to leverage available federal resources. Executive Summary should not exceed 5 pages in length.

Project Timeline - Estimated Completion date: October 30th, 2016

Task 6. Presentation to the Oregon Legislative Assembly.

Contractor may be required to present the full report to the appropriate legislative committees. These briefings will include presentation of the final report and allow legislators (and others whom they may invite) to engage in discussion with the key principals about the recommended design option, payment system, impacts to the health systems, and health system planning design, and the reasons underlying the Contractor's recommendations.

Project Timeline - Estimated Completion date: October 30th, 2016

Summary of Task Deliverables and Timeframes	
Description	Timeframe
Task 1 Description of the Financing Options to be Modeled: Methods and Data	First Draft - 6/30/16 Final Draft - 7/14/16
Task 2 Modeling the Individual Financing Options	First Draft - 7/30/16 Final Draft - 8/30/16
Task 3 - Model Comparisons and Comprehensive Analysis	First Draft - 8/18/16 Final Draft - 8/31/16
Task 4 - Implementation: Key Considerations and Implications	First Draft - 9/15/16 Final Draft - 9/31/16
Tasks 5. Comprehensive Report and Recommendations	First Draft - 10/15/16 Final Draft - 10/30/16
Task 6. Presentation to the Oregon Legislative Assembly.	First Draft - 10/15/16 Final Draft - 10/30/16

Acceptance Criteria/Payment

Contractor shall submit draft reports according to the timeline previously specified (see dates in Schedule of Deliverables above). OHA will review draft reports and return with comments within fifteen (15) business days of receipt. Contractor shall then amend the report as appropriate, and shall provide a final draft of the report(s) to OHA within ten (10) business days of receipt of OHA comments.

Acceptance Criteria: OHA will review Contractor’s reports to ensure they adhere to the specifications agreed in the tasks and deliverables work plan that include but not limited to addressing the requirements set forth in House Bill 3260.

Payment of invoices by OHA will be made in accordance with Oregon law.

Payment provisions of the Contract are subject to negotiation. However, OHA anticipates that OHA will pay the Contractor a fixed price payment upon the OHA receipt and approval of Tasks 1 and 4 Deliverables, and a separate fixed price payment upon the OHA receipt and approval of Task 5 Deliverables. OHA will complete its review of all deliverables in a timely manner.

PROCUREMENT REQUIREMENTS AND EVALUATION

MINIMUM REQUIREMENTS

To be considered for evaluation, each Proposal must demonstrate how Proposer meets all requirements of this section: It is expected that the Proposers to this RFP have knowledge of the federal and state programs that provide coverage to large populations. OHA is interested in how Proposers would demonstrate their particular expertise with federal and state-funded health coverage programs, modeling the impact of various large scale health reform initiatives, and assessing macroeconomic impacts of national and state health policy reform proposals. Proposers are expected to describe their expertise and experience in the following areas and number your responses to the requirement as listed below:

Minimum Key Person Requirements

One or more of Proposer's Key Persons (see Note below) * must possess all of the following experience as confirmed by the Minimum Qualifications Certification in Attachment C - Proposer Certification Sheet, and as confirmed by the Key Person's or Key Persons' resume(s) submitted with the Proposal:

- 3.1.1.1** Minimum of five years of experience advising state government agencies on health and insurance related matters including but not limited to federal and state health exchanges or similar health coverage mechanisms or entities.
- 3.1.1.2** Minimum of five years of experience estimating funding mechanisms and costs associated with enrollment levels for new programs, including enrollment uptake rates and enrollment/disenrollment rates.
- 3.1.1.3** Minimum of five years of experience working with states on modeling alternative coverage, financing, and delivery reform initiatives.
- 3.1.1.4** Minimum of five years of experience projecting annual health care costs.
- 3.1.1.5** Minimum of five years of experience estimating premiums and cost-sharing.

***Note:** the qualifications of one or more Key Persons may be combined in order to meet the above minimum qualifications.

MINIMUM SUBMISSION REQUIREMENTS

Proposal Format and Quantity

Proposal should follow the format and reference the sections listed in the Proposal Content Requirements section. Responses to each section and subsection should be labeled to indicate the item being addressed. Proposal must describe in detail how requirements of this RFP will be met and may provide additional related information. Cost information must be submitted as a separate electronic file/sealed envelope.

Proposer shall submit its Proposal without extensive art work, unusual printing or other materials not essential to the utility and clarity of the Proposal. Proposer shall submit both a hard copy on white 8 ½" x 11" Recycled Paper and an electronic copy on electronic media such as thumb drive or CD.

Proposer shall submit an **original**, bearing the Proposer's authorized representative's Signature, and **5 copies** of the un-redacted Proposal. In addition, if Proposer believes any of its Proposal is exempt from disclosure under Oregon Public Records Law (ORS 192.410 through 192.505), Proposer shall complete and submit the Affidavit of Trade Secret (Attachment B) and a fully redacted version of its Proposal, clearly identified as the redacted version.

Proposer shall submit its Proposal in a sealed package addressed to the SPC with the Proposer's name and the RFP number clearly visible on the outside of the package.

Proposer's electronic copy of the Proposal by USB drive, DVD, or CD must be formatted using Adobe Acrobat (pdf).

Proposal Page Limit

Proposal is limited to **41 pages**, excluding resumes. Any pages exceeding this limit will not be provided to the evaluation committee or considered in the evaluation. The following items do **not** count toward the page limit:

- Proposal Certification Sheet (Attachment C)

- Proposer Information Sheet (Attachment D)

- Any required forms

- Cost Proposal

- Resumes

Authorized Representative

A representative authorized to bind the Proposer shall sign the Proposal. Failure of the authorized representative to sign the Proposal may subject the Proposal to rejection by Agency.

PROCUREMENT PROCESS

Public Notice

The RFP, including all Addenda and attachments, is published in the Oregon Procurement Information Network (ORPIN) at <http://www.orpin.oregon.gov>. RFP documents will not be mailed to prospective Proposers.

Agency shall advertise all Addenda on ORPIN. Prospective Proposer is solely responsible for checking ORPIN to determine whether or not any Addenda have been issued. Addenda are incorporated into the RFP by this reference.

Questions / Requests for Clarification

All inquiries, whether relating to the RFP process, administration, deadline or method of award, or to the intent or technical aspects of the RFP must:

- Be delivered to the SPC via email, facsimile, hard copy

- Reference the RFP number

- Identify Proposer's name and contact information

- Be sent by an authorized representative

- Refer to the specific area of the RFP being questioned (i.e. page, section and paragraph number); and

- Be received by the due date and time for Questions/Requests for Clarification identified in the Schedule

Pre-Proposal Conference

A pre-Proposal conference will not be held for this RFP.

Solicitation Protests

Protests to RFP

Prospective Proposer may submit a Written protest of anything contained in this RFP, including but not limited to, the RFP process, Specifications, Scope of Work, and the proposed Contract. This is prospective Proposer's only opportunity to protest the provisions of the RFP, except for protests of Addenda or the terms and conditions of the proposed Contract, as provided below.

Protests to Addenda

Prospective Proposer may submit a Written protest of anything contained in the respective Addendum. Protests to Addenda, if issued, must be submitted by the date/time specified in the respective Addendum, or they will not be considered. Protests of matters not added or modified by the respective Addendum will not be considered.

Protests must:

- Be delivered to the SPC via email, facsimile, hard copy

- Reference the RFP number

- Identify prospective Proposer's name and contact information

- Be sent by an authorized representative

- State the reason for the protest, including:

 - the grounds that demonstrate how the Procurement Process is contrary to law, Unnecessarily Restrictive, legally flawed, or improperly specifies a brand name; and

 - evidence or documentation that supports the grounds on which the protest is based

- State the proposed changes to the RFP provisions or other relief sought

- Protests to the RFP must be received by the due date and time identified in the Schedule

- Protests to Addenda must be received by the due date identified in the respective Addendum

Protest Response

Agency will respond timely to all protests submitted by the due date and time listed in the Schedule. Protests that are not received timely or do not include the required information may not be considered.

Proposal Submission Options

Proposer is solely responsible for ensuring its Proposal is received by the SPC in accordance with the RFP requirements before Closing. Agency is not responsible for any delays in mail or by common carriers or by transmission errors or delays or mistaken delivery. Proposal submitted by any means not authorized will be rejected.

Submission through ORPIN

Submission through ORPIN is not allowed for this RFP.

Submission through Mail or Parcel Carrier

Proposal may be submitted through the mail or via parcel carrier, and must be clearly labeled and submitted in a sealed envelope, package or box. The outside of the sealed submission must clearly identify the Proposer's name and the RFP number. It must be sent to the attention of the SPC at the address listed on the Cover Page.

Submission in Person

Proposal may be hand delivered, and must be clearly labeled and submitted in a sealed envelope, package or box. Proposal will be accepted, prior to Closing, during Agency's normal Monday –Friday business hours of 8:00 am to 5:00 pm Pacific Time, except during State of Oregon holidays and other times when Agency is closed. The outside of the sealed submission must clearly identify the Proposer's name and the RFP number. It must be delivered to the attention of the SPC at the address listed on the Cover Page.

Proposal Modification or Withdrawal

Any Proposer who wishes to make modifications to a Proposal already received by Agency shall submit its modification in one of the manners listed in the Proposal Submission Options section and must denote the specific change(s) to the Proposal submission.

If a Proposer wishes to withdraw a submitted Proposal, it shall do so prior to Closing. The Proposer shall submit a Written notice Signed by an authorized representative of its intent to withdraw its Proposal in

accordance with OAR 125-247-0440. The notice must include the RFP number and be submitted to the SPC.

Proposal Due

Proposal and all required submittal items must be received by the SPC on or before Closing. Proposal received after the Closing will not be accepted. All Proposal modifications or withdrawals must be completed prior to Closing.

Proposals received after Closing are considered LATE and will NOT be accepted for evaluation. Late Proposals will be returned to the respective Proposer or destroyed.

Proposal Rejection

Agency may reject a Proposal for any of the following reasons:

Proposer fails to substantially comply with all prescribed RFP procedures and requirements, including but not limited to the requirement that Proposer's authorized representative sign the Proposal in ink.

Proposer fails to meet the responsibility requirements of ORS 279B.110.

Proposer makes any contact regarding this RFP with State representatives such as State employees or officials other than the SPC or those the SPC authorizes, or inappropriate contact with the SPC.

Proposer attempts to inappropriately influence a member of the Evaluation Committee.

Proposal is conditioned on Agency's acceptance of any other terms and conditions or rights to negotiate any alternative terms and conditions that are not reasonably related to those expressly authorized for negotiation in the RFP or Addenda.

Opening of Proposal

There will be no public Opening of Proposals. Proposals received will not be available for inspection until after the evaluation process has been completed and the Notice of Intent to Award is issued pursuant to OAR 125-247-0630. However, Agency will record and make available the identity of all Proposers after Opening.

PROPOSAL CONTENT REQUIREMENTS

Proposal must address each of the items listed in this section and all other requirements set forth in this RFP. Proposer shall describe the Goods to be provided or the Services to be performed or both. A Proposal that merely offers to provide the goods or services as stated in this RFP will be considered non-Responsive to this RFP and will not be considered further.

3.4.1 Key Persons' Experience and Qualifications (Page limit: 5 pages).

Key Person Resumes: Proposer shall specify Key Persons to be assigned to the Work and include a current resume (not to exceed 4 pages each) for each individual Key Person that demonstrates qualifications and experience for performing the Work described in Section 2.3 - Scope of Work.

Narrative Statement: Proposer shall include a narrative statement describing the Key Persons' qualifications, experience and proficiency in these areas:

- Expertise and experience advising state government agencies on health and insurance related matters including but not limited to federal and state health exchanges or similar health coverage mechanisms or entities;
- Experience estimating funding mechanisms and costs associated with enrollment levels for new programs, including enrollment uptake rates and enrollment/disenrollment rates;
- Experience working with states on modeling alternative coverage, financing, and delivery reform initiatives;
- Familiarity with the health care financing, nationally, and at the state and local level;
- Experience projecting annual health care costs; and
- Experience estimating premiums and cost-sharing.
- Experience working with state officials and staff to meet short time limits.

Availability: Proposer shall describe how Proposer will make available Key Persons and other necessary Proposer staff when OHA requests that Proposer assist OHA in its presentation of the findings of the Final Report.

Coordination: Proposer shall describe how its Key Persons will coordinate with OHA to ensure material is available for the presentation to all necessary parties, including stakeholder groups, or Legislature.

For Key Persons not identified prior to Proposal submission, a detailed position description must be submitted and explanation of how the Key Person position will be filled.

3.4.2 Organizational Capacity. (Page limit: 3 pages). Briefly describe Proposer’s experience and capacity to perform the Work described in this RFP, including: experience and capacity billing and following budgets in contracts, gathering qualitative and quantitative information, knowledge of and experience working with provider incentive programs, different provider types, capacity and experience presenting material to State or Federal Legislatures or political bodies, and experience and capacity writing reports and recommendations in a short timeframe .

3.4.3 Project Work Plan. (Page limit: 30 pages).

Briefly describe how Proposer would accomplish and coordinate the performance of each the major activities of this project as described in Section 2.3 of this RFP, and Proposer must address the additional requirements in Section 3.4.3.1 below.

Proposer’s Project Proposal and Work plan must include the timeline Proposer will follow to ensure that all Work is completed, and all deliverables are provided within the Project Timelines - Estimated Completion dates listed in Section 2.3 above.

3.4.3.1 Key Elements of the Modeling

Proposer shall describe in detail the proposed model, data sets, assumptions, and variables that Propose will use to develop the comprehensive model required to complete the tasks described in Section 2.3 Scope of Work.

Proposer shall identify and describe the information and analysis of data including but not limited to all-payer, all claims data available through OHA, administrative and program data available from state financed programs, national and state survey data, and national expenditure and cost data. Provided below is an **example** of key elements likely required to complete the analysis.

Table 1: Key Elements of the analysis and selected sources of information

Key Element	General Approach	Selected Sources
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		of Informati on
Payment System(s)	Qualitative analysis	<ul style="list-style-type: none"> National and other state experience
Delivery System	Quantitative analysis	<ul style="list-style-type: none"> Oregon's health system transformation, Marketplace, and other statewide health reform initiatives
Financing, Cost Containment, and Estimated Total Cost	Quantitative microsimulation analysis	<ul style="list-style-type: none"> Medical expenditure panel survey household component (MEPS) Medicaid financing; CCO global budgets All-payer, all-claims (APAC)
Individual impact and affordability	Quantitative microsimulation analysis	<ul style="list-style-type: none"> National and other state experience American Community Survey (ACS)
Compliance with Federal Requirements	Legal analysis	<ul style="list-style-type: none"> Published analyses of related federal law, guidance, and interpretations of federal statutes

*The elements identified in the table are ***merely for illustrative*** purposes only.

3.4.4 Proposal Certification Sheet

The Proposer shall complete and submit the Proposal Certification Sheet (Attachment C).

3.4.5 Proposer Information Sheet

The Proposer shall complete and submit the Proposer Information Sheet (Attachment D).

3.4.6 Tax Attestation

The Proposer shall complete and submit the Tax Attestation (Attachment E).

Failure to demonstrate compliance with Oregon Tax Laws may result in a finding of non-responsibility.

3.4.7 References

Proposal shall submit two Reference Check forms (Attachment F) signed by customers or clients for whom Proposer has provided services similar to those described in Section 2.3 of this RFP. The three Reference Check forms must be submitted with the Proposal.

Agency reserves the right to contact the references and the past performance of any Proposer with respect to its successful performance of similar services, compliance with specifications and contractual obligations, and its lawful payment of suppliers, subcontractors, and workers.

Agency may check to determine if references provided support Proposer's ability to comply with the requirements of this RFP. Agency may use references to obtain additional information, break tie scores, or verify any information needed. Agency may contact any reference (submitted or not) to verify Proposer's qualifications.

Agency may postpone the award or execution of Contract(s) under this Procurement in order to complete its review.

3.4.8 Cost Proposal (Page limit: 3 pages)

Submit a detailed Cost Proposal using Attachment G that includes the following items:

The Cost Proposal must include identifiable costs, time estimates for completing the tasks described in Section 2.3 Scope of Work, and a summary of all proposed costs;

The Cost Proposal must include separate line items for personnel, travel, supplies, other costs, and administrative and overhead charges; The Cost Proposal must include fully loaded personnel costs, and the name and title of all positions for each individual staff person or subcontractors, who will perform the Work, and list the payment rate, salary/wage and/or fringe rate separately for each such individual; and

The Cost Proposal shall include a narrative statement explaining how the Cost Proposal is cost effective.

3.4.9 Public Record/Confidential or Proprietary Information

All Proposals are public record and are subject to public inspection after Agency issues the Notice of the Intent to Award. If a Proposer believes that any portion of its Proposal contains any information that is a trade secret under ORS Chapter 192.501(2) or otherwise is exempt from disclosure under the Oregon Public Records Law (ORS 192.410 through 192.505), Proposer shall complete and submit the Affidavit of Trade Secret (Attachment B) and a fully redacted version of its Proposal.

Proposer is cautioned that cost information generally is not considered a trade secret under Oregon Public Records Law (ORS 192.410 through 192.505) and identifying the Proposal, in whole, as exempt from disclosure is not acceptable. Agency advises each Proposer to consult with its own legal counsel regarding disclosure issues.

If Proposer fails to identify the portions of the Proposal that Proposer claims are exempt from disclosure, Proposer has waived any future claim of non-disclosure of that information.

EVALUATION PROCESS

Responsiveness and Responsibility Determination

Proposals received prior to Closing will be reviewed for Responsiveness to all RFP requirements including compliance with Minimum Requirements section and Proposal Content Requirements section. If the Proposal is unclear, the SPC may request clarification from Proposer. However, clarifications may not be used to rehabilitate a non-Responsive Proposal. If the SPC finds the Proposal non-Responsive, the Proposal may be rejected, however, Agency may waive mistakes in accordance with OAR 125-247-0470.

At any time prior to award, Agency may reject a Proposer found to be not Responsible.

Evaluation Criteria

Proposals meeting the requirements outlined in the Proposal Content Requirements section will be evaluated by an Evaluation Committee. Evaluators will assign a score of 0 to 100 for each evaluation criterion listed below in this section.

SPC may request further clarification to assist the Evaluation Committee in gaining additional understanding of Proposals. A response to a clarification request must be to clarify or explain portions of the already submitted Proposal and may not contain new information not included in the original Proposal.

Key Persons' Experience and Qualifications (Maximum Score: 20 points):

Key Person Resumes: Did Proposer identify Key personnel to be assigned to the project and include resume(s) that demonstrate qualifications and experience necessary for performing the Work described in Section 2.3?

Narrative Statement: How well has the Proposer demonstrated that its Key Persons possess qualifications experience, and proficiency in these areas:, research design and methodology, data collection and analysis, use of complex data sets, and health services research, program evaluation, and health policy analysis?

Availability: How well has the Proposer demonstrated Proposer will make available Key Persons and other necessary Proposer staff when OHA requests that Proposer assist OHA in its presentation of the findings of the Full Final Report?

Coordination: How well has the Proposer demonstrated its Key Persons will coordinate with the OHA to ensure material is available for the presentation to all necessary parties, including stakeholder groups, the Health Care Workforce Committee, the Oregon Health Policy Board, or Legislature?

For Key Persons not yet hired, have detailed position descriptions been included? (See Section 3.4.1)

Organizational Capacity (Maximum Score: 10 points): How well did Proposer describe its capacity to perform the Work described in this RFP? (See Section 3.4.2)

Project Work Plan (Maximum Score: 50 points): How well does Proposer's Project Work Plan address the requirements of Section 3.4.4 and demonstrate a workable, efficient and effective plan for accomplishing the work described in Section 2.3 within the Project Timelines and Estimated Completion dates? (See Section 3.4.3).

3.5.2.4 References (Maximum Score: 10 points):

Reference check forms (Attachment F) will be scored as follows:

References will be evaluated using a scale of 0 to 10, with 10 being the highest score.

Each Proposer may receive a maximum of 10 points from References (2 References X 5 questions X Total score by each reference on Attachment F/10).*

*For purposes of this calculation, the scores on References check forms (Attachment F) will be divided by 10.

COST EVALUATION

This procurement will not award a contract on a “lowest-bid” basis, but price will be a factor in the decision making process.

- Does Proposer’s Cost Proposal contain all required items and cost elements?
- Can the cost for each activity category in the Scope of Work be easily determined?
- Is Proposer’s Cost Proposal cost effective?

(See Section 3.4.9). (**Maximum Score: 10 points**).

PREFERENCES

Reciprocal Preference

For evaluation purposes per OAR 125-246-0310, Agency shall add a percent increase to each out-of-state Proposer's Proposal price that is equal to the percent preference, if any, given to a Resident Offer or of the [Proposer's state](#).

Recycled Materials

In comparing Goods from two or more Proposers, if at least one Proposer offers Goods manufactured with Recycled Materials, and at least 1 Proposer does not, Agency will select the Proposer offering Goods manufactured from Recycled Materials if each of the conditions specified in ORS 279A.125 (2) exists following any adjustments made to the price of the Goods according to any applicable reciprocal preference.

Tiebreakers

Oregon Supplies: If Agency receives Proposals identical in price, fitness, availability and quality and chooses to award a Contract/Price Agreement, Agency shall award the Contract/Price Agreement in accordance with the procedures outlined in OAR 125-246-0300.

POINT AND SCORE CALCULATIONS

Scores are the values (0 through 100) assigned by each evaluator.

Points are the total possible value for each section as listed in the table below.

The SPC will average all scores for each evaluation criterion.

Cost points are calculated as stated in the Cost Evaluation section. Points possible are as follows:

TOTAL POINTS POSSIBLE :	
POINTS POSSIBLE	
3.5.2.1	Key Persons' Experience and Qualifications:
3.5.2.2	Organizational Capacity
3.5.2.3	Project Work Plan
3.5.2.4	References
3.12	COST POINTS POSSIBLE

RANKING OF PROPOSERS

SPC will rank all Proposers advancing through all rounds of evaluation. The SPC will total the final average score (calculated by totaling the points awarded by each Evaluation Committee member and dividing by the number of members) from all rounds of competition, together with references, and final cost. After each applicable preference has been applied, SPC will determine rank order for each respective Proposal and Proposer, with the highest score receiving the highest rank, and successive rank order determined by the next highest score.

SPC will rank all Proposers advancing through all rounds of evaluation. The SPC will total the points from the final round of evaluation and cost to determine final ranking.

AWARD AND NEGOTIATION

AWARD NOTIFICATION PROCESS

Award Consideration

Agency, if it awards a Contract/Price Agreement, shall award a Contract/Price Agreement to the highest ranking Responsible Proposer(s) based upon the scoring methodology and process described in Section 3. Agency may award less than the full Scope defined in this RFP.

Intent to Award Notice

Agency will notify all Proposers in Writing that Agency intends to award a Contract/Price Agreement to the selected Proposer(s) subject to successful negotiation of any negotiable provisions.

INTENT TO AWARD PROTEST

Protest Submission

An Affected Offeror shall have 7 calendar days from the date of the intent to award notice to file a Written protest.

A Proposer is an Affected Offeror only if the Proposer would be eligible for Contract/Price Agreement award in the event the protest was successful and is protesting for one or more of the following reasons as specified in ORS 279B.410:

All higher ranked Proposals are non-Responsive.

Agency has failed to conduct an evaluation of Proposals in accordance with the criteria or process described in the RFP.

Agency abused its discretion in rejecting the protestor's Proposal as non-Responsive

Agency's evaluation of Proposals or determination of award otherwise violates ORS Chapter 279B or ORS Chapter 279A.

If Agency receives only one Proposal, Agency may dispense with the intent to award protest period and proceed with Contract/Price Agreement Negotiations and award.

Protests must:

Be delivered to the SPC via email, facsimile or hard copy

Reference the RFP number

Identify prospective Proposer's name and contact information

Be signed by an authorized representative

Specify the grounds for the protest

Be received within 7 calendar days of the intent to award notice

Response to Protest

Agency will address all timely submitted protests within a reasonable time and will issue a Written decision to the respective Proposer. Protests that do not include the required information may not be considered by Agency.

APPARENT SUCCESSFUL PROPOSER SUBMISSION REQUIREMENTS

Insurance

Prior to execution of the Contract/Price Agreement, the apparent successful Proposer shall secure and demonstrate to Agency proof of insurance coverage meeting the requirements identified in the RFP or as otherwise negotiated.

Failure to demonstrate coverage may result in Agency terminating Negotiations and commencing Negotiations with the next highest ranking Proposer. Proposer is encouraged to consult its insurance agent about the insurance requirements contained in Insurance Requirements (Exhibit C of Attachment A) prior to Proposal submission.

Taxpayer Identification Number

The apparent successful Proposer shall provide its Taxpayer Identification Number (TIN) and backup withholding status on a completed W-9 form if either of the following applies:

- When requested by Agency (normally in an intent to award notice), or
- When the backup withholding status or any other information of Proposer has changed since the last submitted W-9 form, if any.

Agency will not make any payment until Agency has a properly completed W-9.

[Reserved]

Business Registry

If selected for award, Proposer shall be duly authorized by the State of Oregon to transact business in the State of Oregon before executing the Contract/Price Agreement. The selected Proposer shall submit a current Oregon Secretary of State business registry number, or an explanation if not applicable.

All Corporations and other business entities (domestic and foreign) must have a Registered Agent in Oregon. See requirements and exceptions regarding Registered Agents. For more information, see Oregon Business Guide, How to Start a Business in Oregon and Laws and Rules. The titles in this subsection are available at the following Internet site:
<http://www.filinginoregon.com/index.htm>.

CONTRACT NEGOTIATION

Negotiation

After selection of a successful Proposer, Agency may negotiate the Statement of Work and the following terms and conditions.

In the event that the parties have not reached mutually agreeable terms within 30 calendar days, Agency, at its discretion, may terminate Negotiations and commence Negotiations with the next highest ranking Proposer.

By submitting a Proposal, Proposer agrees to comply with the requirements of the RFP, including the terms and conditions of the Sample Contract/ (Attachment A), with the exception of those terms reserved for negotiation. Proposer shall review the attached Sample Contract and note exceptions. Unless Proposer notes exceptions in its Proposal, the State intends to enter into a Contract with the successful Proposer substantially in the form set forth in Sample Contract (Attachment A). It may be possible to negotiate some provisions of the final Contract; however, many provisions cannot be changed. Proposer is cautioned that the State of Oregon believes modifications to the standard provisions constitute increased risk and increased cost to the State. Therefore, Agency will consider the Scope of requested exceptions in the evaluation of Proposals.

Any Proposal that is conditioned upon Agency's acceptance of any other terms and conditions may be rejected. Any subsequent negotiated changes are subject to prior approval of the Oregon Department of Justice.

The terms and conditions included in Attachment A, other than Exhibit A, Statement of Work and Payment provisions, and insurance requirements, are not subject to negotiation.

In the event that the parties have not reached mutually agreeable terms within 30 calendar days, Agency may terminate Negotiations and commence Negotiations with the next highest ranking Proposer.

ADDITIONAL INFORMATION

OMWESB PARTICIPATION

Pursuant to Oregon Revised Statute (ORS) Chapter 200, and as a matter of commitment, Agency encourages the participation of minority, women, and emerging small business enterprises in all contracting opportunities. Agency also encourages joint ventures or subcontracting with minority, women, and emerging small business enterprises. For more information please visit <http://www.oregon.gov/gov/MWESB/Pages/index.aspx>

If the Contract/Price Agreement results in subcontracting opportunities, the successful Proposer may be required to submit a completed OMWESB Outreach Plan (Attachment H) prior to execution.

GOVERNING LAWS AND REGULATIONS

This RFP is governed by the laws of the State of Oregon. Venue for any administrative or judicial action relating to this RFP, evaluation and award is the Circuit Court of Marion County for the State of Oregon; provided, however, if a proceeding must be brought in a federal forum, then it must be brought and conducted solely and exclusively within the United States District Court for the District of Oregon.

OWNERSHIP/PERMISSION TO USE MATERIALS

All Proposals submitted in response to this RFP become the Property of Agency. By submitting an Proposal in response to this RFP, Proposer grants the State a non-exclusive, perpetual, irrevocable, royalty-free license for the rights to copy, distribute, display, prepare derivative works of and transmit the Proposal solely for the purpose of evaluating the Proposal, negotiating an Agreement, if awarded to Proposer, or as otherwise needed to administer the RFP process, and to fulfill obligations under Oregon Public Records Law (ORS 192.410 through 192.505). Proposals, including supporting materials, will not be returned to Proposer unless the Proposal is submitted late.

CANCELLATION OF RFP; REJECTION OF PROPOSALS; NO DAMAGES.

Pursuant to ORS 279B.100, Agency may reject any or all Proposals in-whole or in-part, or may cancel this RFP at any time when the rejection or cancellation is in the best interest of the State or Agency, as determined by Agency. Neither

the State nor Agency is liable to any Proposer for any loss or expense caused by or resulting from the delay, suspension, or cancellation of the RFP, award, or rejection of any Proposal.

COST OF SUBMITTING A PROPOSAL

Proposer shall pay all the costs in submitting its Proposal, including, but not limited to, the costs to prepare and submit the Proposal, costs of samples and other supporting materials, costs to participate in demonstrations, or costs associated with protests.

STATEWIDE E-WASTE/RECOVERY POLICY

If applicable, Proposer shall include information in its Proposal that demonstrates compliance with the Statewide [E-Waste/Recover Policy](#) effective July 1, 2012.

RECYCLABLE PRODUCTS

Proposer shall use recyclable products to the maximum extent economically feasible in the performance of the Services or Work set forth in this document and the subsequent Contract/Price Agreement. (ORS 279B.025)

PRINTING, BINDING, AND STATIONERY WORK

Except as provided in ORS 282.210(2), all printing, binding and stationery work, including the manufacture of motor vehicle registration plates and plates required to be affixed to motor carriers, for the State or any county, city, town, port district, school district, or other political subdivision, must be performed within the State.

CHECKLIST DISCLAIMER

Any checklists that may be contained in this RFP are provided only as a courtesy to prospective Proposer. Agency makes no representation as to the completeness or accuracy of any Checklist. Prospective Proposer is solely responsible for reviewing and understanding the RFP and complying with all the requirements of this RFP, whether listed in a checklist or not. Neither the State nor Agency is liable for any claims, or subject to any defenses, asserted by Proposer based upon, resulting from, or related to, Proposer's failure to comprehend all requirements of this RFP.

LIST OF ATTACHMENTS

ATTACHMENT A	SAMPLE CONTRACT/PRICE AGREEMENT
ATTACHMENT B	AFFIDAVIT OF TRADE SECRET
ATTACHMENT C	PROPOSER CERTIFICATION SHEET
ATTACHMENT D	PROPOSER INFORMATION SHEET
ATTACHMENT E	TAX ATTESTATION
ATTACHMENT F	REFERENCE CHECK FORM
ATTACHMENT G	COST PROPOSAL FORM
ATTACHMENT H	OMWESB OUTREACH PLAN

APPENDIX 1: Financing Model Options

Model Inputs	Option A: Single-Payer (Progressive Tax Model)	Option B Health Care Ingenuity Plan (HCIP)	Option C: Alternative Marketplace (Public and Private Partnership)	Option D Existing ACA System
Description	Single insurance program, publicly financed, use private health care system; would replace employer-sponsored insurance (ESI) and commercial health plans with one public coverage plan. Supplemental commercial health services available to purchase, privately, but not paid for under this option. PEBB and OEGB moved into plan, with option to contract for supplemental health coverage.	Single insurance fund to purchase health care; decouples coverage from employment but preserves <i>option</i> for employer-sponsored supplemental insurance. Plan would replace and combine existing publicly funded programs (i.e. PEBB/OEGB, Medicaid, & ACA coverage) into a <i>single</i> fund to finance coverage through private plans. Eliminate ACA employer or individual coverage mandates.	Existing commercial carriers compete with single public plan to allow for fair and robust competition via Exchange; retain ACA individual and employer coverage mandates. Public plan would be available to all individuals below 400% of FPL without affordable ESI coverage.	Current ACA system in Oregon: preserves Medicaid/CCOs, Medicare, Marketplace, and ESI coverage options, retain ACA individual and employer coverage mandates. Serves as baseline and comparator model.
Financing	Publicly financed: employer payroll tax and personal income tax (e.g. levy on firms with > 10 or more employees, cap payroll tax 5-10%). Program would pool federal Medicaid, Medicare, and APTC funds with new OR payroll tax revenue to fund program. Single risk pool.	Publicly financed: broad based sales tax (~5-7%), with new state tax revenue from elimination of employer, health-related deductions. Program would combine worker's compensation medical funds, state/federal Medicaid funds, federal Medicare and ACA APTC subsidies with sales tax revenue to fund program. Multiple risk pools.	Public and private: federal and state funds (Medicaid & federal BHP) pooled to finance public option up to 400% FPL; retain private coverage option for employers and employees. Multiple risk pools.	Public and private: federal, state, & local funding (Medicaid, Medicare, PEBB, OEGB); employer sponsored coverage (ESI); and Marketplace coverage. Multiple risk pools.
Coverage	Universal coverage for all residents regardless of income, employment, and historic eligibility criteria for public programs (e.g. Medicaid/CHIP).	Universal coverage for all residents; optional deductible plan for ESI coverage and private coverage above 400%.	Universal coverage for all residents at or below 400% of FPL; ESI and private coverage available below 400% for individuals <i>not</i> eligible for Exchange coverage; maintain ESI coverage at or above 400% FPL.	No universal coverage: disabled, pregnant and low-income children/adults thru Medicaid; over 65 thru Medicare (& special pops), 0-400% thru Marketplace/QHPs, and ESI coverage.
Consumer Affordability and Choice	No out-of-pocket costs for enrollees (eliminate all premiums, co-pays, or deductibles). Consumer may choose any licensed or certified provider that participates in statewide plan.	Below 400% of FPL copays but no deductibles; at or above 400% deductibles w/option for employers and employees to purchase commercial, supplemental coverage; consumer choice determined by provider participation in available plans; multiple risk pools.	Below 400% of FPL w/copays but no premiums; anyone able to purchase supplemental health coverage. Maintain existing employee cost-sharing for ESI coverage. Consumer choice of public or commercial plans in Marketplace for those w/o ESI.	Premiums and out-of-pocket costs for all individuals except Medicaid enrollees (nominal). Consumer choice available in Marketplace and ESI coverage options, limited plan choice in Medicaid (CCOs).
Benefits (model 2 benefit packages)	(1) Basic plan (10 ACA EHBs, no adult dental/vision), (2) PEBB/OEGB level of coverage.	(1) Basic plan (10 ACA EHBs, no adult dental/vision), (2) PEBB/OEGB level of coverage.	(1) Basic plan (10 ACA EHBs, no adult dental/vision), (2) PEBB/OEGB level of coverage.	Medicaid benefits, EHB level benefits; considerable variation by type of coverage and plan choice.
Provider Reimbursement	One reimbursement/payment rate for all health providers; use global budgets.	Negotiated fee structure: providers negotiate rates with commercial health plans and statewide HCIP.	Negotiated fee structure: providers negotiate rates with public plan and commercial carriers.	Existing tiered structure based on negotiated rate setting: Medicaid, Medicare and commercial.

- APPENDIX 1 Continues on the next page. -

Total Health Care Expenditures

System impacts (*Initial list: section 1.4(c)(A-F)).