



**Medicaid Management Information System Replacement (MMISR) Project**

**Instructions for Responding to this Request for Quote (RFQ)**

**Data Service**

**Date: December 1, 2022**

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# Purpose

The New Mexico (NM) Human Services Department (HSD) is interested in procuring Data Services (DS) related to its current Medicaid Management Information System Replacement (MMISR) Project, and Health and Human Services 2020 (HHS2020) initiative. The HSD is requesting quotes from (1) contractors who hold a current State-Wide Price Agreement (SWPA) or (2) SWPA Contractors affiliated with Federal General Services Administration (GSA)-contracted vendors or (3) Federal-GSA vendors who qualify for a NM SWPA for the provision of Information Technology (IT) Professional Services or other applicable price agreement categories.

This engagement resulting from this Request for Quote (RFQ) will establish a foundational integrated data solution including an Enterprise Data Warehouse (EDW) that supports the Business Intelligence and Analytics of the larger MMISR project and the HHS2020 Enterprise initiative. Contractors should inform themselves regarding these projects by reading the overview approach below and consulting the procurement library of related procurements and supporting documentation. Bidders should especially review the section of the Procurement Library entitled, “Data Services Information.”

The NM Procurement Library link is <https://webapp.hsd.state.nm.us/Procurement/>

The instructions and information below are intended to assist the contractors in providing a quote for the HSD evaluation.

# Quote Schedule

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

|  |  |  |
| --- | --- | --- |
| **Action** | **Responsible Party** | **Due Date\*** |
| 1. Issue RFQ | HSD | 12/1/22 |
| 2. Due Date for Submission of Questions | Potential Contractors | 12/21/22 |
| 3. HSD Response to Vendor Questions | HSD | 12/30/22 |
| 4. Vendor Quotes Due to HSD | Contractors | 1/23/23 |
| 5. HSD Selects and Notifies Finalists | HSD Selection Committee | 2/6/23 |
| 6.Finalist Q & A Teleconferences (optional) | Contractor Finalists | 2/9/23 |
| 7. Award Determination (start of contract approval process) | HSD Selection Committee | 2/16/22 |

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

# Response Format and Organization

## Number of Responses

Each SWPA Contractor shall submit only one (1) response to this RFQ.

## Response Files

Each Contractor shall deliver, by single electronic mail, the following files to the HSD Procurement Manager. The total file size must not exceed 20MB.

**Letter of Transmittal:** Offeror’s proposalmust be accompanied by a Letter of transmittal which must be completed and signed by an individual person authorized to obligate the company. The letter of transmittal MUST:

* 1. Identify the submitting business entity including New Mexico State Tax ID and SHARE ID;
  2. Identify the name, title, telephone number and e-mail address of the person authorized by the Offeror organization to contractually obligate the business entity providing the Offer;
  3. Identify the name, title, telephone number and e-mail address of the person authorized to negotiate the contract on behalf of the Offeror organization (if different than 2.b);
  4. Identify the names, titles, telephone numbers and e-mail addresses of persons to be contacted for clarification and/or questions regarding proposal content;
  5. Identify subcontractors (if any) anticipated to be used in performing any resultant contract;
  6. Describe the relationship with any other entity that will participate in performing services under an awarded contract;
  7. Include in your transmittal letter the following statements:
     + (Vendor Name) has received and reviewed any and all amendments to the RFQ as posted in the Procurement Library.
     + (Vendor Name) Will comply with all the conditions and requirements for this RFQ and applicable NM Procurement code.
     + (Vendor Name) has the capacity to cover the $500,000 bond detailed in the draft HSD Data Services Contract.

1. Be signed by the person identified in paragraph 2.b above.

**References:** Offerors shall provide at least five (5) references from similar large-scale healthcare/health insurance or other highly regulated industry projects performed for private, State or large local government clients within the last three (3) years.

Within the proposal, offerors must submit list of references with the following information for each reference:

* + Client name;
  + Project description;
  + Project dates (starting and ending);
  + Technical environment (e.g., software applications, internet capabilities, data communications, network, hardware);
  + Description of role in completing the project;
  + Client contact name, phone number, and e-mail address

**Part A Technical Approach**: one electronically signed pdf file and the corresponding MS Word Document. Part A must not include any cost information.

File Name = *Contractor\_Name*\_Part\_A\_Technical\_Approach (PDF and .doc)

**Part B Quote Budget**: one electronically signed pdf file and the corresponding MS Word Document/Excel File. Submit the Quote Budget Form only.

File Name = *Contractor\_Name*\_Part\_B\_Quote\_Budget (PDF and .doc)

**Part C Milestone Timeline:** one electronically signed excel file

File Name = *Contractor\_Name*\_Part\_C\_Timeline

All files must be received by the Procurement Manager **no later than 3:00 PM** (Mountain Time) on the date of submission as per the Quote Schedule. Contractors are advised to use an email return request confirmation. Any response that does not adhere to the requirements of this section may be deemed non-responsive and may be rejected on that basis.

# Procurement Manager

The Procurement Manager for this RFQ is Grace Aroha. All submissions and any other needed communication must be directed to the Procurement Manager, Grace Aroha at grace.aroha@hsd.nm.gov.

# Quote Format

This section describes the required format, content and organization for all quotes.

## Part A: Technical Approach

The work of this engagement is organized into four (4) key areas of technological and management expertise. A fifth section addresses ongoing maintenance and operations. Each area requires presentation of contractor’s corporate qualifications, corporate experience, business or technical approach for a successful implementation, and prior engagement references to verify the corporate experience.

*Please note that we are interested in how you currently perform this work for other similar organizations (public or private).*

Part A: Technical Approach must follow the outline, page limits and page formatting instructions detailed below.

### Formatting Instructions

Font: Calibri eleven (11) point

Spacing: Single

Margins: One-inch margins on all sides

Paper: 8 1/2 X 11

Header: Contractor Name

Footer: Page number

File size: Not to exceed 20 MB (to enable email delivery)

Formats: Please submit 3 formats as indicated below:

1. PDF
2. Redacted PDF (to meet public disclosure requirements)
3. Original word and or excel versions (for evaluation committee use)
4. Outline as follows:

Cover or Title Page

Table of Contents

Summary of corporate and overall approach to the engagement objectives. (Limit 5 pages)

Initial Enterprise Milestone Projections

Submit Rough Order of Magnitude (ROM) Timeline of Milestones to complete each of the sections noted below (as detailed in the DS Contractor Qualifications document). (Limit 1 Excel workbook page)

Data Services Enterprise Data Warehouse and Analytics Implementation Section

Response to Required Contractor Qualifications; Subcontractor identification details if applicable (Limit 5 pages)

Response to Specific Experience (Limit 2 pages)

Approach to Deliverables and Methods for Success (Limit 10 pages)

Security Section

Response to Required Contractor Qualifications; Subcontractor identification details if applicable (Limit 6 pages)

Response to Specific Experience (Limit 2 pages)

Approach to Deliverables and Methods for Success (Limit 5 pages)

Project Management Section

Response to Required Contractor Qualifications; Subcontractor identification details if applicable (Limit 2 pages)

Response to Specific Experience (Limit 2 pages)

Approach to Deliverables and Methods for Success (Limit 5 pages)

CMS Certification Section

Response to Required Contractor Qualifications; Subcontractor identification details if applicable (Limit 2 pages)

Response to Specific Experience (Limit 2 pages)

Approach to Deliverables and Methods for Success (Limit 2 pages)

Maintenance and Operations Section

Response to Required Contractor Qualifications; Subcontractor identification details if applicable (Limit 2 pages)

Response to Specific Experience (Limit 2 pages)

Approach to Deliverables and Methods for Success (Limit 3 pages)

## Part B: Quote Budget

The Data Services module work includes development and implementation of the Enterprise Data Warehouse (EDW) and the Business Intelligence (BI) Analytics platforms. Maintenance and Operations (M&O) over a four (4) year period is to be quoted separately.

Quotes should be all inclusive of contractor costs that will be charged to the HSD.

Please note that the HSD is responsible for costs of all hardware, software, applications, and tools required for the project. Contractor must specify If their quote requires HSD to acquire such items.

The tables below list the work products and request a corresponding quote. Quotes should include NM Gross Receipts Tax (NMGRT). Contractors are cautioned to contact NM Tax and Revenue Department to determine their tax obligation for work performed remotely out of state vs in state service delivery.

All quotes must be presented only in Part B on the Quote Budget Form below. No discussion of quotes, costs, rates, expenses should be included in other parts of the contractor response.

|  |  |
| --- | --- |
| Data Services Enterprise Data Warehouse and Analytics Work Products | Quote Inclusive of NMGRT |
| Establish Enterprise Data Warehouse, Data Marts (Member Months and Income Support Client) and Dashboards (Customer Eligibility & Utilization – Phase 1 and Income Support Client) |  |
| Configure, Test and Implement Second Iteration of Data Marts (Utilization) and Dashboards (Customer Eligibility & Utilization – Phase2 and JUST Health) |  |
| Configure, Test and Implement Third Iteration of Data Marts (Utilization: Behavioral Health) and Dashboards (Customer Eligibility & Utilization – Phase 3) |  |
| Configure, Test and Implement Fourth Iteration of Data Marts (Provider and Financial Services) and Dashboards (Financial) |  |
| Implementation Plan |  |
| Data Models |  |
| Business Continuity/Disaster Recovery Plan |  |
| Capacity Planning |  |
| System Design Document |  |
| Data Services Enterprise Data Warehouse and Analytics Total |  |

|  |  |
| --- | --- |
| Security Work Products | Quote Inclusive of NMGRT |
| Security Documents Creation |  |
| Security Total |  |

|  |  |
| --- | --- |
| Project Management Work Products | Quote Inclusive of NMGRT |
| Project and Enterprise Management and Lifecycle Management Plans/ Addendums |  |
| Product Transition Planning and Management |  |
| Project Management Total |  |

|  |  |
| --- | --- |
| CMS Certification Work Products | Quote Inclusive of NMGRT |
| MMIS Certification |  |
| Certification Total |  |

|  |  |
| --- | --- |
| **All Implementation Work Product Sections** | **Quote Inclusive of NMGRT** |
| All Implementation Sections Total |  |

**Maintenance and Operations (M&O)**:

| **Maintenance and Operations Work Products** | **Quote Inclusive of NMGRT** |
| --- | --- |
| Maintenance and Operations Plan |  |
| Maintenance and Operations Services |  |
| Year One |  |
| Year Two |  |
| Year Three |  |
| Year Four |  |
| Technical Operations Plan |  |
| Platform Hosting Services and Report |  |
| Maintenance and Operations Total |  |

Final All-Inclusive Quote:

Please confirm the total quote of services:

|  |  |
| --- | --- |
| **Total of All Sections** | **Quote Inclusive of NMGRT** |
| All Sections Total |  |

# Response Specifications

## Part A Specifications

Submit the following items in Part A.

**Technical Approach**

1. Cover or Title Page – contractor’s preference as to format and content
2. Table of Contents – match outline described in section 5.1.
3. Summary of corporate and overall approach to the engagement objectives. (Limit 5 pages)
4. For each named section include the following four (4) parts.
   1. Required Contractor Qualifications. Response must specify the contractor’s current expertise regarding each listed qualification.
   2. Specific Experience. Response must include description of at least two engagements of similar size and complexity including client name, begin and end dates, engagement contracted dollar value, scope, technical environment, primary products and tools, similarities, successes, and client’s project manager name, phone number, and email.
   3. Approach to Deliverables and Methods for Success. Response should include proven approaches to similar engagements, proven repeatable processes and methods to be employed and other content illustrating corporate competence and preparation for success in this engagement. Contractor should include their recommended Service Level Agreements (SLA) and Performance Standards for the section.
   4. Reference Contact Information. Response must include contact information for at least three (3) references for engagements in progress or concluded since 2021. Contact information must include client name, project or engagement name, engagement begin and end dates, contact name, email address, and phone number. Contact information may be included for one primary contact and one secondary contact.

## Part B Specifications

Submit the following item in Part B.

**Quote Budget Form.** Response must include only the completed Quote Budget Form. Incomplete forms will be considered a non-responsive quote. Dollar amounts must include all costs to be charged from the contractor to HSD. Dollar amounts must include NMGRT. NMGRT should not be shown as a separate cost. The contractor is solely responsible for determining the applicable NMGRT and for compliance with New Mexico Tax and Revenue requirements.

# Evaluation

## Oral Presentation

HSD may select finalists and may invite finalists to present an overview of its quote to the Evaluation Committee and to answer the HSD questions to clarify costs and service quoted.

## Evaluation Factors

All quotes will be evaluated for the perceived benefit related to the purposes of this RFQ as described in the Invitation to Quote document. The Contractor quote that is most advantageous to the HSD will be considered for award. Please note, however, that, regardless of overall score, a serious deficiency in the response to any one factor may be grounds for rejection. The contract award will go to the finalist deemed to be the most advantageous to and of best value to the HSD for the requested work.

## Evaluation Point Summary

RFQ responses will be scored on a point system with one-thousand (1,000) total points including orals. Offerors with the highest total points will be considered Finalists. The number of Finalist Offerors will be determined at the discretion of the Evaluation Committee. Finalists may be asked to provide an Oral Presentation with a possible score of one hundred (100) points. The award for this contract will go to the Finalist deemed to be the most advantageous and to offer the best value to the State for this work.

Table 1 summarizes evaluation factors for this RFP and their associated point values. These weighted factors will be used in the evaluation of Offeror proposals.

Table1 Evaluation Point Summary

|  |  |  |
| --- | --- | --- |
| **Evaluation Criteria Description** | **MAX AWARDED POINTS** | **% Total Score**  **of 1000** |
| **Vision - Understanding of…** | **60** | **6%** |
| MMISR, HHS2020 and interdependencies  with other contractors | 20 |  |
| CMS and certification | 40 |  |
| **Technical** | **260** | **26%** |
| Vision for Solution (current and future) | 100 |  |
| Data Warehouse Solution | 80 |  |
| BI/Analytics Solution | 80 |  |
| **Project Management** | **115** | **11.5%** |
| Project Management and Reporting | 20 |  |
| Project Approach (including resources) | 65 |  |
| Milestone Timeline | 30 |  |
| **Cost Proposal** | **275** | **27.5%** |
| DDI | 150 |  |
| M&O | 125 |  |
| **Experience** | **200** | **20%** |
| Healthcare/Health Insurance or other  Highly Regulated Industry | 60 |  |
| Data Warehouse | 75 |  |
| BI/Analytics | 65 |  |
| **References** 5 references requested, at least 3 responses required | **90** | **9%** |
| Reference 1 | 30 |  |
| Reference 2 | 30 |  |
| Reference 3 | 30 |  |