

**Part A and Part B (A/B) -
Medicare Administrative Contractor
(A/B-MAC)
Jurisdictions 4, 5, and 12**

Pre-Proposal Conference

October 13, 2006



WELCOME

Karen Jackson
Director, Medicare Contractor Management Group

OPENING REMARKS

Herb Kuhn
Director, Center for Medicare Management

PURPOSE OF PRE-PROPOSAL CONFERENCE, GROUND RULES, OVERVIEW AND REQUESTS FOR INFORMATION (RFIs)

Karen Jackson
Director, Medicare Contractor Management Group

PURPOSE

 **To clarify CMS direction**

The purpose of this conference is to allow prospective offerors the opportunity to gain a better understanding of the objectives of the acquisition. In addition, it also offers CMS an opportunity to stress the importance of significant elements of the Request for Proposal (RFP) while identifying any significant differences between the Cycle One RFP and previous MAC RFPs.

GROUND RULES

- Speakers will go through agenda items.
- Audio conferencing lines have been established for those regional offices that chose to join us.
- Break (after presentations - approximately 30 minutes).
- CMS will attempt to address questions that are submitted today.
- CMS will post responses to questions in an amendment under the Federal Business Opportunities (FedBizOpps) database.
- Reminder: Please turn off cell phones and pagers.

GROUND RULES (con't)

- Remarks and explanations provided today do not qualify the terms of the solicitation.
- The information provided at this conference is considered supplemental guidance and does not override the terms of the RFP and specifications.
- For any ambiguities and/or conflicting information the offerors shall refer to the RFP.
- Any required changes to the RFP will be accomplished through a formal amendment.

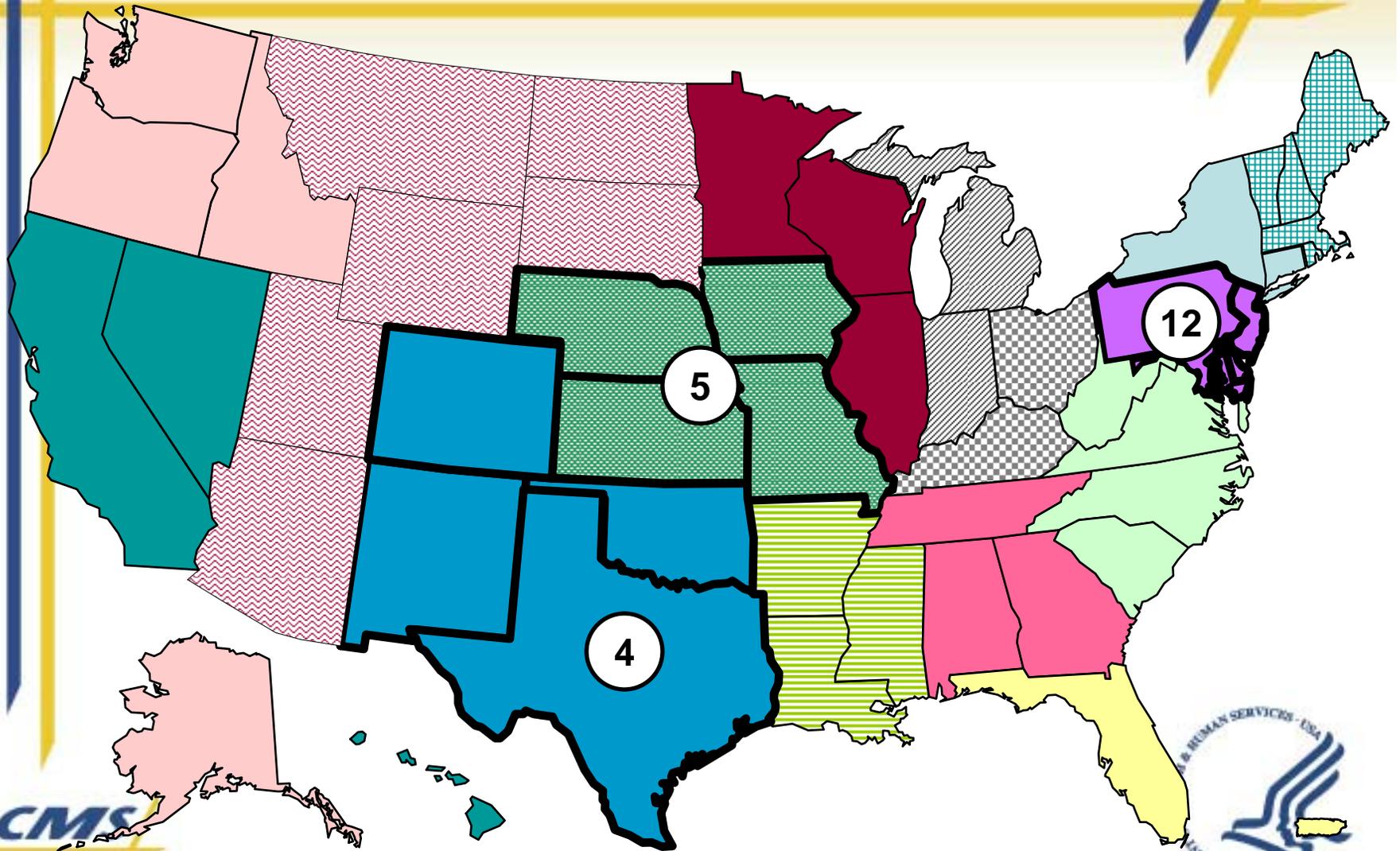
OVERVIEW

- On September 29, 2006, CMS released the first RFP for the Cycle One fee-for-service Medicare Administrative Contractor (MAC) procurement.
- Three (3) separate MAC contracts will be awarded to serve Medicare beneficiaries and providers in Jurisdictions Four (J4), five (J5), and twelve (J12).

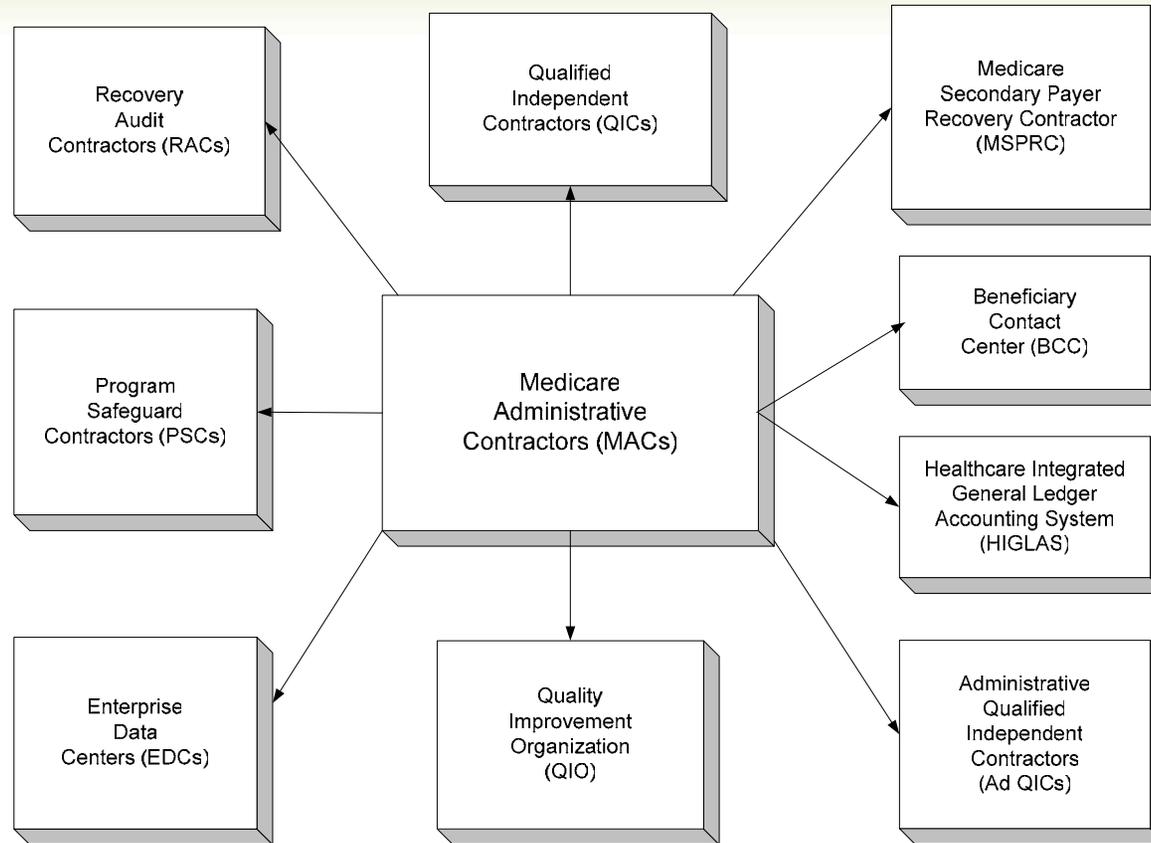
A/B-MAC JURISDICTIONS

- J4 is comprised of the following states: Colorado, New Mexico, Oklahoma, and Texas.
- J5 is comprised of the following states: Iowa, Kansas, Missouri, and Nebraska.
- J12 is comprised of the following states: Delaware, District of Columbia, Maryland, Pennsylvania, and New Jersey.

A/B-MAC JURISDICTIONS (con't)



Medicare Fee-For-Service Program Administrative Functional Environment



CURRENT FISCAL INTERMEDIARIES AND CARRIERS OPERATING IN EACH JURISDICTION

Jurisdiction 4 (J4):

- Noridian Mutual Insurance Company (Colorado - Part B)
- Group Health Services of Oklahoma, Inc. (Oklahoma - Part A)
- Arkansas Blue Cross and Blue Shield (New Mexico and Oklahoma – Part B)
- Trailblazer Health Enterprise, LLC (Texas, New Mexico, Colorado – Part A, Texas – Part B)
- Mutual of Omaha Insurance Company (some providers in Colorado, New Mexico, Oklahoma, Texas – Part A)

Jurisdiction 5 (J5):

- Arkansas Blue Cross and Blue Shield (Eastern Missouri – Part B)
- Noridian Mutual Insurance Company (Iowa – Part B)
- Blue Cross and Blue Shield of Nebraska (Nebraska – Part A)
- Trispan (Missouri – Part A)
- Cahaba (Iowa – Part A)
- Blue Cross and Blue Shield of Kansas, Inc. (Kansas – Part A, Western Missouri, Kansas, Nebraska – Part B)
- Mutual of Omaha Insurance Company (some providers in Iowa, Kansas, Missouri, and Nebraska – Part A)

CURRENT FISCAL INTERMEDIARIES AND CARRIERS OPERATING IN EACH JURISDICTION

Jurisdiction 12 (J12):

- Blue Cross and Blue Shield of Tennessee (New Jersey – Part A)
- Empire HealthChoice Assurance, Inc. (Delaware – Part A; New Jersey – Part B)
- Highmark, Inc. – HGSAdministrators (Pennsylvania – Part B)
- Highmark, Inc. - Veritus (District of Columbia, Maryland, and Pennsylvania – Part A)
- Mutual of Omaha Insurance Company (some providers in Delaware, District of Columbia, Maryland, New Jersey and Pennsylvania – Part A)
- TrailBlazer Health Enterprises, LLC (Delaware, District of Columbia and Maryland – Part B)

This information is available on the Medicare Contracting Reform website: <http://www.cms.hhs.gov/medicarecontractingreform>

RFP OVERVIEW

**Darrell Bachman
Contract Specialist**

CONTACT INFORMATION

- Email: darrell.bachman@cms.hhs.gov
- Telephone: 410.786.7442
- Send RFP Questions Directly to an Established RFP Mailbox :
CMS_AB_MAC_J4_J5_J12@cms.hhs.gov

A/B MAC PROCUREMENT TIMELINE

09/29/06	RFP Posted to FedBizOpps
10/13/06	Pre-Proposal Conference
10/19/06	RFP Questions Due
10/31/06	Intent to Propose Due
11/2/06	Post Answers to RFP Questions on FedBizOpps
11/14/06	Proposals Due
07/30/07	Contract Award

RFP OVERVIEW – SECTION G (CONTRACT ADMINISTRATION DATA)

- Contracting Officer – Linda Hook
- Contract Specialist – Darrell Bachman
- Project Officer – Whitney May
- Business Function Leads (BFL) - TBD

RFP OVERVIEW – GENERAL CONTRACT INFORMATION

- Federal Acquisition Regulations (FAR) - www.arnet.gov
- Health and Human Services Acquisition Regulation (HHSAR) www.hhs.gov/oamp/dap/hhsar.html
- Period of Performance (Mandated by Legislation) Not to Exceed Five (5) Years

RFP OVERVIEW – GENERAL CONTRACT INFORMATION (con't)

Order of Precedence – Uniform Contract Format (UCF) – FAR 52.215-8

- Any inconsistency in the solicitation or
- contract shall be resolved by giving
- precedence in the following order:
 - The Schedule (excluding the specifications)
 - Representations and other instructions
 - Contract Clauses
 - Other documents, exhibits and attachments
 - The specifications

RFP OVERVIEW – FEDBIZOPPS

Department of Health and Human Services Business Opportunities

Office : Centers for Medicare & Medicaid Services, formerly known as the Health Care Financing Administration

Location : Office of Acquisition and Grants Management

Solicitation number : CMS-2006-0033

Title : R -- Primary Part A and Part B (A/B) Medicare Administrative Contractor (MAC)

[Synopsis](#) - Posted on Sep 07, 2006

[Part A/B MAC Pre-Proposal Conference Notification 01](#) - Posted on Oct 03, 2006

[Solicitation 01](#) - Posted on Sep 29, 2006

**Register to Receive
Notification**

**Register as
Interested Vendor**

[View List of Interested Vendors](#)



RFP OVERVIEW – FEDBIZOPPS (con't)

VENDOR NOTIFICATION SERVICE

- Allows vendors to register to receive e-mails notifying the vendor of all notices from a particular solicitation.
- The FedBizOpps system includes the capability to join and view a published list of vendors interested in a particular solicitation.

RFP OVERVIEW – SECTION B (SUPPLIES OR SERVICES AND PRICES/COST)

- Contract Type
 - Cost-Plus-Award-Fee (CPAF)
 - Base Fee Plus Award Fee
- Contract Line Item Number (CLIN)
- Sub Line Item Number (SLIN)
 - Have been established to separate the monies associated with Medicare Integrity Program (MIP), Program Management (PM), Part A, and Part B.

RFP OVERVIEW – SECTION F (CLAUSE F.2 PERIOD OF PERFORMANCE)

- CLIN 0001 Implementations:
 - Transitions NTE six months per segment
 - No more than 2 segments per jurisdiction in the same month
 - Completion of all segment moves with 12 months ADC
- CLINS 0002 – 0006 A/B Operations: 12 months from exercise of option
- CLIN 0007 Workload Closeout Activities: 6 months from exercise of option.
- Total Performance Period: 5 years

RFP OVERVIEW – SECTION F (DELIVERABLES & PERFORMANCE)

- Clause F4 – Deliverables
 - Deliverables to the Project Officer
 - Deliverables to the Business Owner
 - Attachment J-2 Deliverable Schedule
- Ad Hoc Reporting
 - CMS may require additional reporting requirements on an as needed basis.

RFP OVERVIEW - SECTION G – CONTRACT ADMINISTRATION DATA

Clause G.9	CONTRACTING OFFICER RESPONSIBILITY
Clause G.11	PROJECT OFFICER RESPONSIBILTIIY
Clause G.12	TECHNICAL DIRECTION

RFP OVERVIEW - SECTION G – CONTRACT ADMINISTRATION DATA

Clause G.17	SEPARATION OF MIP AND PM FUNDING BY PART A AND PART B
Clause G.18	SEPARATION OF TRUST FUND EXPENDITURES / ACCOUNTING FROM ADMINISTRATIVE EXPENDITURES / ACCOUNTING
Clause G.19	COMPLEMENTARY CREDITS

RFP OVERVIEW - SECTION G – CONTRACT ADMINISTRATION

Clause G.25

**INDIRECT COST -
PROVISIONAL RATES**

Clause G.26

PROVISIONAL RATES

RFP OVERVIEW - SECTION H – SPECIAL CONTRACT REQUIREMENTS

Clause H.1	KEY PERSONNEL
Clause H.4	CONFLICT OF INTEREST
Clause H.6	HEALTH INSURANCE PORTABILITY AND ACCOUNTABILITY ACT OF 1996 BUSINESS ASSOCIATE PROVISION II

RFP OVERVIEW - SECTION H – SPECIAL CONTRACT REQUIREMENTS

- Clause H.22 WORK PERFORMED OUTSIDE THE UNITED STATES AND ITS TERRITORIES

The Contractor, and its subcontractors, shall not perform any activities under this contract outside the United States without the prior written approval of the Contracting Officer.

RFP OVERVIEW - SECTION H – SPECIAL CONTRACT REQUIREMENTS

- H.24 SECURITY CLAUSE –
BACKGROUND INVESTIGATIONS FOR
CONTRACTOR PERSONNEL

Badge requirements only applies to Contractor employees working at the CMS complex.

RFP OVERVIEW – SECTION C (STATEMENT OF WORK)

Whitney May
Director, Division of MAC
Strategy and Development, CMS

RFP OVERVIEW – STATEMENT OF WORK (con't)

- Key SOW Requirements:
 - Local Coverage Determinations (LCDs)
 - Provider Customer Service Program
 - Claims Processing
 - Appeals
 - Audit and Reimbursement
 - Medical Review
 - Comprehensive Error Rate Testing (CERT)
 - Medicare Secondary Payer
 - Unique Requirements
 - Fraud and Abuse

UNIQUE REQUIREMENTS

- Core – Each MAC will perform these duties:
 - Coordinated Care Benefits Demo (Notice of Enrollment)
 - ESRD Clinical Trial
 - Freestanding Rural Health Clinics
 - Federally Qualified Health Centers (FQHCs)
 - Foreign Claims
 - Laboratory Competitive Bidding Demonstration
 - Shipboard / Foreign Travel Services

UNIQUE REQUIREMENTS (cont'd)

- Jurisdiction Specific – Only those MACs in the corresponding jurisdictions will be responsible for these workloads

Requirement	Jurisdiction
Centralized Billing for Mass Immunizers	4
Indian Health Services (IHS)	4
Low Vision Demonstration	5
Rural Community Hospital Demonstration	4 and 5
Veterans Affairs Medicare Equivalent Remittance Advice Project	4
Chiropractic Services Demonstration	4 and 5

RFP OVERVIEW – STATEMENT OF WORK (cont'd)

- ◆ Interface/JOA Requirements:
 - Beneficiary Contact Center (BCC)
 - Qualified Independent Contractor (QIC)
 - Administrative QIC (AdQIC)
 - Program Safeguard Contractor (PSC)
 - ▶ CMS intends to establish one PSC per MAC jurisdiction.
 - Quality Improvement Organization (QIO)
 - ▶ MACs will have one JOA for each state.
 - Enterprise Data Center (EDC)
 - MSP Recovery Contract (MSPRC)
 - Coordination of Benefits Contractor (COBC)
 - Provider Reimbursement Review Board (PRRB)

WORKLOAD CONSIDERATIONS

- Workloads found in Section L of the RFP are reflective of the current FFS contractors in the corresponding states.
 - These assumptions exclude the Mutual of Omaha workload.

RFP OVERVIEW – SECTION L (PROPOSAL INSTRUCTIONS)

Linda Hook
Contracting Officer

RFP OVERVIEW – SECTION L (con't)

- Offerors shall not make any assumptions that CMS evaluators have any prior knowledge of their capabilities in performing the SOW requirements.

RFP OVERVIEW – SECTION L (con't)

PROPOSAL ORGANIZATION

- Offerors should organize their proposal IAW L.10 General Instruction as follows:
 - Volume I – Technical Proposal (L.13)
 - Volume II – Business Proposal (L.15)
 - Volume III – Conflict of Interest and Compliance Program (L.17)
- Proposal Assumptions IAW L.11

RFP OVERVIEW – SECTION L (con't)

PROPOSAL ORGANIZATION

- Clearly mark each box with content and jurisdiction identification
- Clearly label binders
 - The original of volumes I, II, and III shall be marked “ORIGINAL.”
 - All copies shall be marked “COPY # __ of __.”
 - If multiple binders are required for a volume, mark the binders as “Volume I, Technical Proposal, Book 1 of 2.”

RFP OVERVIEW – SECTION L (con't)

TECHNICAL PROPOSAL VOLUME I – PAGE LIMITS

Technical Proposal – Volume I- Page Limit 280 pages

TAB 1 Technical Approach	Page limit 170 pages
A. Project Management	10 pages included in the 170 pages
B. Technical Approach to Ongoing Operations	100 pages included in the 170 pages
C. Personnel	
(1) Key Personnel	Resumes limited to 3 pages each, not included in page limit
(2) Staffing Plan	60 pages included in the 170 pages

RFP OVERVIEW – SECTION L (con't)

TECHNICAL PROPOSAL VOLUME I – PAGE LIMITS

Technical Proposal – Volume I- Page Limit 280 pages

TAB 2 Implementation	Page limit 60 pages
A. Implementation Work Breakdown Structure	Not included in the page limit
B. Implementation Personnel	included in the 60 page limit
C. Implementation Risk Management Plan	Included in the 60 page limit

RFP OVERVIEW – SECTION L (con't)

TECHNICAL PROPOSAL VOLUME I – PAGE LIMITS

Technical Proposal – Volume I- Page Limit 280 pages

Written Technical Proposal Elements	Page Limits
TAB 3 Management Controls	Page limit 50 pages
A. Quality Management Plan	included in the 50 page limit
B. Information Security Plan	included in the 50 page limit
(a) self-assessment	Not included in the page limit
TAB 4 Past Performance	Not included in the page limit
TAB 5 Corporate Experience	Not included in the page limit

RFP OVERVIEW – SECTION L (con't)

TECHNICAL PROPOSAL INSTRUCTIONS / EVALUATION CRITERIA FOR AWARD

- Written Technical Proposal Instructions and evaluation factors for award are outlined in Section M.3 as combined sections
 - The technical proposal instructions follow the evaluation factors for award

RFP OVERVIEW – SECTION L (con't)

MULTIPLE JURISDICTIONS

- This RFP will result in the award of 3 stand-alone contracts.
- Offerors may submit proposals for any or all jurisdictions.
- Separate proposals must be submitted for each jurisdiction.
- Offerors are required to propose separate key personnel for each jurisdiction for which they are submitting a proposal.

RFP OVERVIEW – SECTION L (con't)

TECHNICAL PROPOSAL – TAB 1

TECHNICAL APPROACH TO ONGOING OPERATIONS

Criteria	SOW Section(s)
Claims Processing	C.5.3; C.5.8
Provider Customer Service Program	C.5.7
Appeals	C.5.9; C.5.10; C.5.6
Audit and Reimbursement	C.5.11
Medical Review/Local Coverage Determinations	C.5.12; C.5.6
Comprehensive Error Rate Testing	C.5.13
Medicare Secondary Payer	C.5.14
Unique Requirements	C.5.16-C.5.22; C.7
Fraud and Abuse	C.5.13

RFP OVERVIEW – SECTION L (con't)

TECHNICAL PROPOSAL – TAB 2 IMPLEMENTATION SCHEDULE (L.11)

Proposals must adhere to all assumptions listed in Section L of the RFP when developing their implementation schedule.

- CMS will begin support for no more than two (2) segments per jurisdiction in the same month.
- The MAC transitions shall last no longer than six (6) months per segment.
- Completion of all segment moves to the MAC shall occur within twelve (12) months of award.
- To the extent possible, no workload segments shall cutover mid-month.
- No cutovers shall occur on the quarterly systems releases (January 1, April 1, July 1, or October 1).
- There shall be no more than two (2) segments per Jurisdiction that cut over in the same month.

RFP OVERVIEW – SECTION L (con't)

JURISDICTION 4

Current Contractor Segments	States	Earliest Allowable Start Date	*Earliest Allowable Cut-Over Dates
Jurisdiction 4 Segments	CO, NM, OK, TX	09/01/07	05/01/08
Noridian C	CO	10/01/07	02/01/08
HCSC	OK	10/01/07	03/01/08
Arkansas C	NM, OK	09/01/07	03/01/08
Trailblazer FI	TX, NM, CO	11/01/07	05/01/08
Trailblazer C	TX	11/01/07	05/01/08

- Offerors may propose a different segment order than the order listed in Section L of the RFP.
- Although segment order may be changed, segments may not be cutover prior to dates stated in far right hand column nor start implementation prior to dates found in third column.

RFP OVERVIEW – SECTION L (con't)

JURISDICTION 5

Current Contractor Segments	States	Earliest Allowable Start Date	*Earliest Allowable Cut-Over Dates
Jurisdiction 5 Segments	IA, KS, MO, NE	09/01/07	06/01/08
Noridian C	IA	10/01/07	02/01/08
Nebraska FI	NE	10/01/07	03/01/08
Arkansas C	MO	09/01/07	03/01/08
Trispan FI	MO	11/01/07	05/01/08
Cahaba FI	IA	11/01/07	05/01/08
Kansas FI	KS	12/01/07	06/01/08
Kansas C	MO, KS, NE	12/01/07	06/01/08

- Offerors may propose a different segment order than the order listed in Section L of the RFP.
- Although segment order may be changed, segments may not be cutover prior to dates stated in far right hand column nor start implementation prior to dates found in third column.

RFP OVERVIEW – SECTION L (con't)

JURISDICTION 12

Current Contractor Segments	States	Earliest Allowable Start Date	*Earliest Allowable Cut-Over Dates
Jurisdiction 12 Segments	DC, DE, MD, PA, NJ	10/01/07	06/01/08
Highmark FI	PA, DC, MD	10/01/07	02/01/08
Riverbend FI	NJ	10/01/07	02/01/08
Empire FI	DE	11/01/07	03/01/08
Highmark C	PA	11/01/07	05/01/08
Empire C	NJ	12/01/07	05/01/08
Trailblazer C	DE, DC, MD	12/01/07	06/01/08

- Offerors may propose a different segment order than the order listed in Section L of the RFP.
- Although segment order may be changed, segments may not be cutover prior to dates stated in far right hand column nor start implementation prior to dates found in third column.

RFP OVERVIEW – SECTION L (con't)

TECHNICAL PROPOSAL – TABS 4 & 5

PAST PERFORMANCE/CORPORATE EXPERIENCE

- **Past Performance** – Will be based on the references provided under Corporate Experience and information obtained independently by CMS from a variety of public or private sources.
- **Corporate Experience** - Offerors are required to provide information in relation to contracts it has performed in the past five years that demonstrate experience similar or related to the SOW IAW Section M.3 (Tab 5).

RFP OVERVIEW – SECTION L (con't)

BUSINESS PROPOSAL – TAB 5 OTHER ADMINISTRATIVE DATA TEAMING ARRANGEMENTS FAR 9.601

- Offerors should fully disclose any teaming arrangement in their proposal
- Relationships shall be fully disclosed
- Clearly identify Prime and subcontractor responsibilities
- Submit an organization structure chart depicting the relationships between parent and subsidiaries as well as subcontracts
- Clearly identify overall responsibility and accountability of each proposed contractor

RFP OVERVIEW – SECTION L (con't)

BUSINESS PROPOSAL – TAB 5 OTHER ADMINISTRATIVE DATA SERVICE CONTRACT ACT

- Business Proposal, Tab 5 – identify proposed labor categories subject to the Service Contract Act (FAR 22.10).
- Provide a crosswalk to the labor category in the applicable Wage Determination for proposed place of performance.
- Wage Determinations may be obtained at www.servicecontract.fedworld.gov.

RFP OVERVIEW – SECTION L (con't)

BUSINESS PROPOSAL – TAB 7

SMALL BUSINESS SUBCONTRACTING PLAN (L.7)

- Must be submitted is the proposed contract exceeds \$500,000
- Small Business Goals – Overall, for the total dollars subcontracted, 34% should go to Small Businesses
- As a subset of the 34%, the following goals are recommended:
 - Small Disadvantaged Businesses 6.35%
 - Women-owned Small Business 5.00%
 - HUBZone Businesses 3.00%
 - Veteran-Owned Small Businesses 3.00%
 - Service Disabled Veteran Owned Business 3.00%

RFP OVERVIEW – SECTION L (con't)

BUSINESS PROPOSAL – TAB 7

SMALL BUSINESS SUBCONTRACTING PLAN (L.7)

(Continued)

- Small Disadvantaged Business (SDB) participation will be evaluated to determine:
 - Extent to which SDB concerns are specifically identified.
 - Extent of an Offeror's commitment to use SDB concerns.
 - Complexity and variety of the work SDB concerns are to perform.
 - The viability of the offeror meeting the goals presented in the plan.
 - The extent of participation of SDB concerns in terms of the value of the total acquisition.

RFP OVERVIEW – SECTION L (con't)

WORK BREAKDOWN STRUCTURE

- Only required for Implementation IAW M.3, Tab 2 Implementation Proposal Instructions.
- IAW M.3 TAB 1, Technical Approach Proposal Instructions - WBS is not required for ongoing operations.
 - Elements of WBS required:
 - ▶ Project Management Plan
 - ▶ Staffing Plan
- Cost Templates will provide the detail CMS requires in the Business Proposal.

COST TEMPLATES

Cynthia D'Annunzio
Division of MAC
Strategy and Development

COST REPORTING PROCESS

- Different process for monthly cost reporting under the MACs:
 - Current process – FIs/Carriers use CAFM II system to report costs for functional activities; functional activity costs broken down by ABC codes.
 - New process – MACs will use the CMS Accounting, Reporting, and Tracking (ART) system.
 - ▶ CMS ART is an enterprise-wide system also being used by other Medicare FFS contractors, e.g. the Program Safeguard Contractors and the Qualified Independent Contractors.
 - ▶ Functional activity costs broken down for each CLIN based on the statement of work.
 - ▶ Proposals will provide detail to level 3 in the cost reporting templates, attachments J21-J23.
 - ▶ Subsequent cost reporting will provide detail to level 4 or 5, as shown in the sample cost reporting templates, attachments J-28 and J-29. These are for informational purposes only.

COST REPORTING TEMPLATES

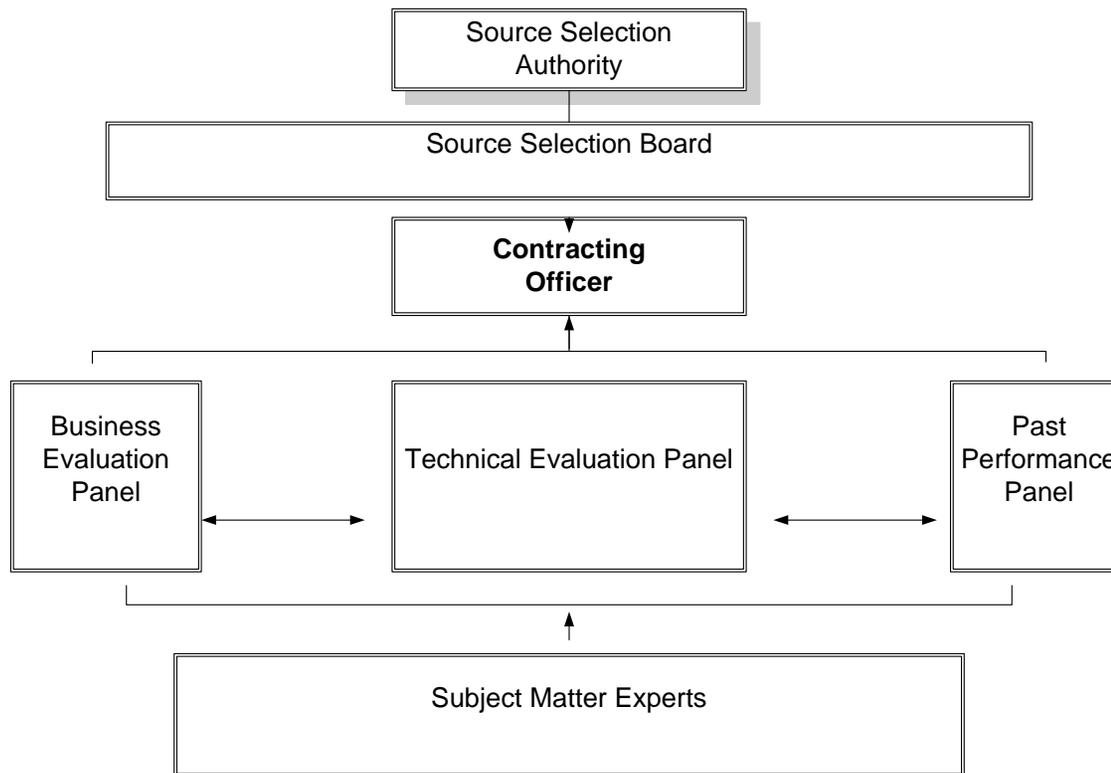
- Cost Reporting Templates, Attachments J21-J23 mirror the statement of work.
- CLIN structure:
 - CLIN 0001 – Implementation
 - CLIN 0002 – Base Year
 - CLIN 0003 – Option Year 1
 - CLIN 0004 – Option Year 2
 - CLIN 0005 – Option Year 3
 - CLIN 0006 – Option Year 4
 - CLIN 0007 – Workload Closeout
- Files provided for CLINs 0001, 0002, and 0007. Offerors are responsible for duplicating CLIN 0002 for the option years, as explained in the instructions, and for creating a summary spreadsheet that includes totals for each CLIN and a grand total for all CLINs.

RFP OVERVIEW – SECTION M

Linda Hook
Contracting Officer

RFP OVERVIEW – SECTION M

Cycle One RFP 1 Source Selection Structure



RFP OVERVIEW – SECTION M (Con't)

TECHNICAL EVALUATION FACTORS AND SUBFACTORS – EQUAL IN IMPORTANCE (M.3)

1. Technical Approach

- A. Project Management
- B. Technical Approach to Ongoing Operations
 - 1) Claims Processing
 - 2) Provider Customer Service Program
 - 3) Appeals
 - 4) Audit and Reimbursement
 - 5) Medical Review/Local Coverage Determinations (LCDs)
 - 6) Comprehensive Error Rate Testing (CERT)
 - 7) Medicare Secondary Payer
 - 8) Unique Requirements
 - 9) Fraud and Abuse
- C. Personnel
 - 1) Key Personnel
 - 2) Staffing Plan

RFP OVERVIEW – SECTION M (con't)

TECHNICAL EVALUATION FACTORS AND SUBFACTORS – EQUAL IN IMPORTANCE (M.3)

2. Implementation

- A. Implementation Work Breakdown Structure (WBS)
- B. Implementation Personnel
- C. Implementation Risk Management Plan

3. Management Controls

- A. Quality Management Plan
- B. Information Security Plan

4. Past Performance

5. Corporate Experience

RFP OVERVIEW – SECTION M (con't)

- Each technical proposal shall be evaluated qualitatively and categorized using the following adjectival ratings in relation to the evaluation factors:
 - Outstanding
 - Very Good
 - Good
 - Marginal
 - Poor
- Award decision will be made based on overall best value determination.

RFP OVERVIEW – SECTION M (con't)

COMPETITIVE RANGE

- Comprised of all of the most highly rated proposals.
- CO may limit the number of proposals in the competitive range to the greatest number that will permit an efficient competition.
- Competitive Range will be determined based on:
 - Evaluation of Written technical proposals for the A/B-MAC services.
 - Evaluation of Business Proposal.
 - Evaluation of the Conflict of Interest and Compliance Program.
 - Preliminary responsibility determination.

RFP OVERVIEW – SECTION M (con't)

ORAL PRESENTATIONS

- May be held after competitive range determination.
- Used to enhance the Technical Evaluation Panel's (TEP's) understanding of the written technical proposal.
- Offerors in the competitive range will be provided specific instructions and schedule information.

RFP OVERVIEW – SECTION M (con't)

PROPOSAL EVALUATION

- **Technical Proposal Evaluation**

TEP will evaluate and assign an adjectival rating in accordance with section M.3

- **Business Proposal Evaluation**

Analyzed and evaluated by a separate Business Evaluation Panel (not assigned an adjectival rating)

- **Conflict of Interest and Compliance Program Proposal**

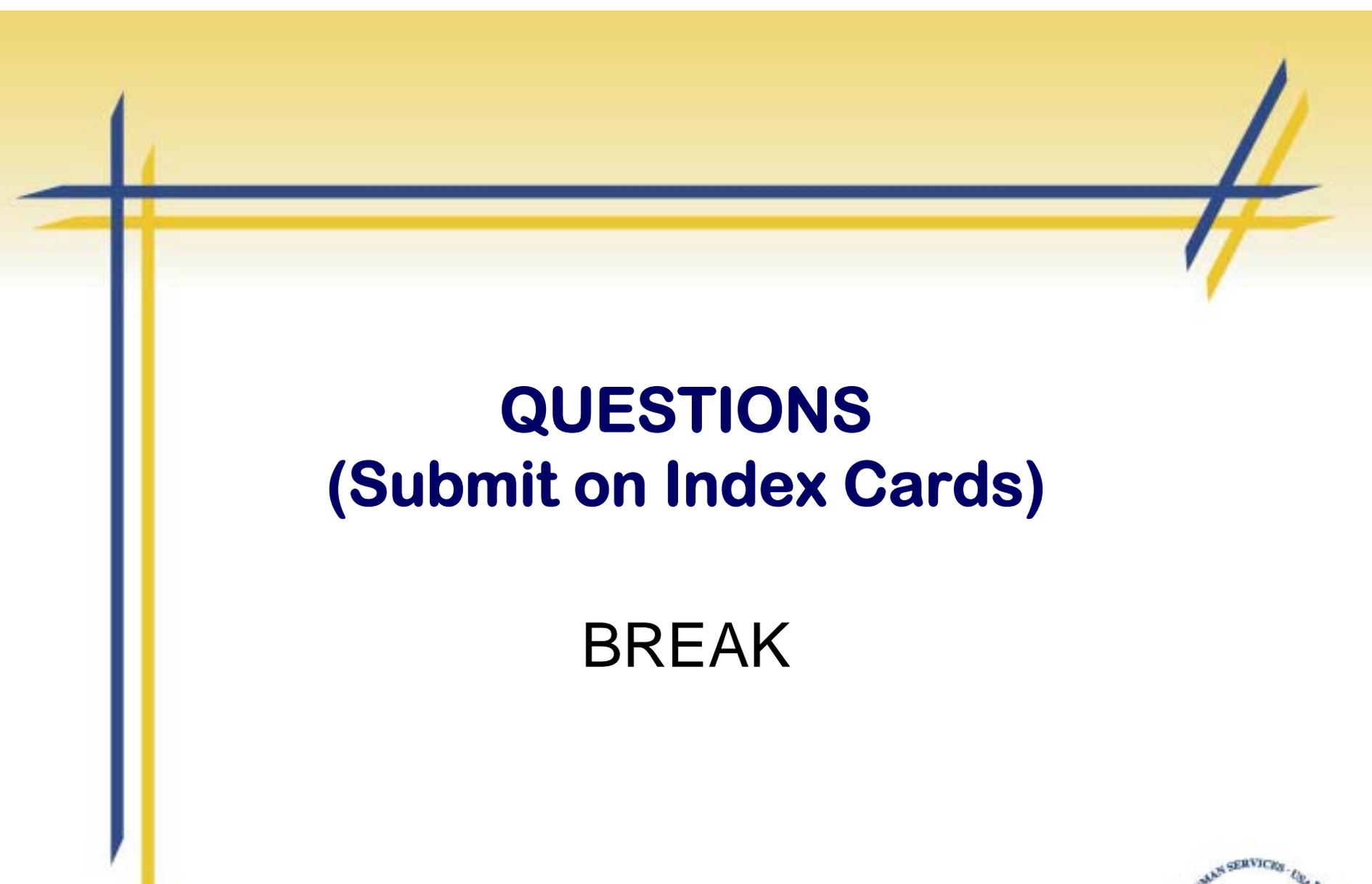
Will be evaluated by the CMS Compliance Officer (not assigned an adjectival rating)

RFP OVERVIEW – SECTION M (con't)

CONTRACT AWARD

- Best Value Trade-Off Process - IAW FAR 15.101-1
- Award may be made to other than lowest price offeror or other than the highest technically rated offeror
- Cost reasonableness and cost realism will be considered

Amendments



QUESTIONS (Submit on Index Cards)

BREAK