



Oklahoma Health Care Authority

Contract Coordinator: Sheila Killingsworth
Email: Sheila.Killingsworth@okhca.org

Calendar of Events

All dates are estimates and subject to change.

ACTIVITY	DATE
RFP available on OHCA website/email vendors	February 17, 2015
Questions due to OHCA by 3:00 p.m. CT	February 24, 2015
RFP answers available on website	February 26, 2015
Proposals Due to OHCA by 3:00 p.m. CT	March 5, 2015
Proposal Presentation	March 18, 2015
Award of Contract	March 30, 2015
Operations Begin	April 1, 2015

Section I: General Information

A. Introduction

OHCA is issuing this Request for Proposal (RFP) for the services of a vendor to develop and implement a multimedia marketing campaign to promote Insure Oklahoma throughout the entire State of Oklahoma.

The Vendor shall assist OHCA to achieve the following goals:

1. Redesign Insure Oklahoma's website on Ektron platform, version 8.0.2.035, Section 508 Compliance (excluding coverage application and pages behind portal log-in); and
2. Create, write, design and produce all types of communication tools that are effective in generating increased target audience knowledge and awareness.
3. Negotiate and purchase media buys within allotted budget after developing campaign strategy.

B. Overview

Oklahoma Health Care Authority (OHCA):

OHCA is the state agency that administers the Oklahoma Medicaid Program, known as SoonerCare. Medicaid is a federal and state entitlement program that provides funding for medical benefits to low-income individuals who have inadequate or no health insurance coverage. Medicaid guarantees coverage for basic health and long-term care services based upon income and/or resources. Created as Title XIX of the Social Security Act in 1965, Medicaid is administered at the federal level by the Centers of Medicare and Medicaid Services (CMS) within the Department of Health and Human Services (HHS). CMS establishes and monitors certain requirements concerning funding, eligibility standards and quality and scope of medical services. States have the flexibility to determine some aspects of their own programs, such as setting provider reimbursement rates and the broadening of the eligibility requirements and benefits offered within certain federal parameters.

Insure Oklahoma (IO):

Insure Oklahoma is a state-sponsored program designed to bridge the health coverage gap for low-income, working Oklahomans. Created in 2005, Insure Oklahoma is celebrating its 10th anniversary and is currently authorized to operate through December 31, 2015. Officials continue to work toward a solution for long-term sustainability.

Insure Oklahoma offers two premium assistance programs: the Employer-Sponsored Insurance program and the Individual Plan. The program is funded with state tobacco tax funds matched with federal dollars.

Insure Oklahoma is at 60 percent capacity. More than 4,000 businesses participate in the Employer-Sponsored Insurance program, covering more than 13,000 Oklahomans. More than 4,000 individuals are enrolled in the Individual Plan. Total enrollment is 17,727 (January 2015).

C. Definitions

1. ESI - provides employee health premium assistance to Oklahoma businesses with 99 or fewer employees.
2. IP – the Individual Plan offers health coverage for qualified adults who do not have access to an employer's insurance plan. Insure Oklahoma requires enrollees to meet

age, residency, income and employment qualifications.

D. Budget

In consideration for the satisfactory performance of the services under this Contract, OHCA shall pay Contractor in accordance with the amounts shown on the Contractor's Price Proposal (See Form-4). The budget for this RFP is not to exceed \$300,000 with included media buys for the period April 1, 2015 and terminate on June 30, 2015, with options to renew for two additional one-year periods (July 1st – June 30th). The option to renew shall be contingent upon the needs of the OHCA, funding availability, and is at the sole discretion of the OHCA. If OHCA does not intend to issue a change order for the new fiscal year, it will notify the Contractor. The budget for subsequent fiscal years shall not exceed \$300,000. Final approval of renewal amounts will be at the sole discretion of the OHCA. Increases or decreases at the time of renewal shall not require a modification in accordance with this RFP's amendment clause.

Section II: Proposal Format and Requirements

A. Bid Submittal

1. **Strict Due Date and Time:** Bids received by the OHCA after the response due date and time shall be deemed non-responsive and shall NOT be considered for any resultant award.
2. **Opening:** Emailed bids shall be opened by the Oklahoma Health Care Authority located at 4345 N. Lincoln Blvd, Oklahoma City, OK 73105 at the time and date specified in the solicitation as the Response Due Date and Time.
3. **Rejection:** OHCA reserves the right to reject any bids that do not comply with the requirements and specifications of the solicitation. A bid may be rejected when the Bidder imposes terms or conditions that would modify requirements of the solicitation or limit the Bidder's liability to the State. Other possible reasons for rejection of bids are listed in OAC 580:16-7-32

B. General:

This solicitation relies on the Bidder's expertise and experience to determine how to achieve OHCA's objectives and define and deliver the required project or program, and requires the successful Bidder to develop and write a detailed statement of work, requirements and performance measures.

C. Language:

Proposal Responses shall be in clear, concise language suitable for inclusion in a contract with the State. This is defined as easy-to-understand, non-technical information related to quality, cost, time, and other verifiable performance indicators of Bidders' personnel, processes, and past performance.

D. Proposal Presentation:

Selected Bidder(s) will have the opportunity to make more comprehensive presentations during the Proposal Presentation phase of the solicitation.

E. Bid Submission Instructions:

1. A complete proposal containing all required forms and signatures should be scanned and must be submitted by email to the Contract Coordinator in one file as an attachment in Adobe PDF. The subject line of the email shall include the solicitation number for this RFP, 8070000805. If the Bidder is requesting information be considered proprietary or confidential (see Section J).
2. The Bidder must use the forms provided in the RFP Library and may not modify these forms in any way except to complete the required information and duplicate the individual item templates, subject to page limitations. Failure to follow these instructions may result in a bid being judged non-responsive.
3. The Bidder shall submit the following items in the proposal:

Document	Form #	Page Limit
Proposal Cover Page with any Certification Exceptions	1	1
Checklist	2	1
Corporate Stability and Resources	3	1
Bidder's Price Proposal and Milestone Schedule	4	2
Bidder's Response to Questions	6	2
Bidder's Proposed Scope of Work, OHCA Responsibilities	7	11
Signed amendment acknowledgements(s) if any RFP amendments have been posted and if the Bidder has not previously submitted these to the Contract Coordinator	N/A	N/A
Total Page Limit		18*

***This page limit excludes the existing language provided by the OHCA in the Terms and Conditions Document.**

4. Any pages submitted in excess of the limits above will not be read, evaluated, or considered in scoring the RFP.
5. The type size shall not be smaller than 12 point. The top, bottom, left and right margins shall be at least one inch, excluding headers and footers. All pages must be numbered and one-sided.
6. The Bidder shall not submit any items other than those listed above. If the Bidder submits marketing material, illustrations, extra pages or narrative, etc., the Bid may be considered non-responsive. In no case will the additional information be considered in the evaluation.
7. If the Bidder needs to change a bid prior to the solicitation response due date, a new bid shall be submitted to OHCA in accordance with all submittal instructions with the addition of the following statement "This bid supersedes the bid previously submitted." No changes are accepted after the closing date and time.
8. The Bidder's Proposal must meet the following requirements. Failure to comply with any of these requirements may result in the Bid being judged non-responsive.
 - a. The Proposal Cover Page shall only contain the company name in the title of the document, and all references to the company thereafter shall be 'Contractor.' The Bidder shall ensure to eliminate any names that can be used to identify the Bidder (such as firm names, personnel names, or Project names).

- b. The Bidder may use terms like “Project Manager”, or “our Subcontractor” or similar when referring to individuals, but not actual names.
 - c. OHCA may, at its discretion, redact text from the Contract Draft if it believes that the text may cause Evaluators to identify a particular Bidder.
- 9. The Proposal Response shall not include the proposed cost that Bidder has identified on the Contractor’s Cost Proposal.
 - 10. OHCA shall take the selected Bidder’s Proposal Response and combine the Proposal Response with the OHCA Terms and Conditions Document (in the Bidder’s Library) as Section B – Contractor’s Provisions. This document will make up the “Contract between the OHCA and the Contractor”. The document will be returned to the selected Bidder for execution by the person with the authority to bind the selected Bidder to a contractual relationship.

F. Bid Submission Requirements:

Bidders shall provide the following information using the Forms provided in the Bidder’s Library or the specific format whichever is applicable:

- 1. Completed Proposal Cover Page (See Form 1) limited to one page**
- 2. Completed Checklist (See Form 2) limited to one page**
- 3. Corporate Stability and Resources (See Form 3) limited to one page**

Bidders must provide information on their Corporate Stability and Resources for both the entities/organizations and individuals who will be involved in this work. The Corporate Stability and Resources information is required for the entities/organizations only.
- 4. Bidder’s Price Proposal and Milestone Schedule (See Form 4) limited to 2 pages**
- 5. Bidder’s Response to OHCA Questions (See Form 6) limited to 2 pages**
- 6. Bidder’s Proposed Scope of Work, OHCA Responsibilities (See Form 7). Bidders should use their expertise and experience to develop the items shown on Form 7 limited to 11 pages.**

G. Contract Development:

The pages in the RFP Forms Package will be added by the OHCA to the OHCA Terms and Conditions found in the Bidder’s Library. The entire Bidder’s Response will not exceed the 18 page limit. Any items over the 18 pages will not be reviewed or scored.

H. Bidder Questions

All questions and requests for clarification or changes or regarding the meaning or interpretation of any RFP provision should be submitted to the email address specified on the RFP Cover Page using the template provided in the RFP Library. Questions will not be accepted by mail, fax or telephone. Bidders must submit questions no later than the date and time shown on the cover sheet. Answers to the questions shall be posted as amendments to the RFP on the OHCA web site (<http://www.okhca.org>). Access the amendment documents by clicking “About Us” at the top of the page and then on “Procurement” in the column on the left side of the page.

I. RFP Amendments

1. OHCA shall post amendments to this solicitation on its website. As a courtesy, OHCA may send emails to its vendor list about amendments, but it is the Bidder’s responsibility to check frequently for any possible amendments that may be issued. OHCA is not responsible for a Bidder’s failure to acquire any amendment documents required to complete a solicitation.
2. The Bidder shall acknowledge receipt of any and all amendment(s) to this solicitation by signing and returning the amendment(s) with its proposal. Failure to acknowledge solicitation amendment(s) may be grounds for rejection.
3. No oral statement of any person shall modify or otherwise affect the terms, conditions, or specifications stated in the solicitation. All amendments to the solicitation shall be made in writing by OHCA.

J. Public Disclosure

1. Documents and information a Bidder submits as part of or in connection with a solicitation is public records and subject to disclosure, unless otherwise specified in applicable law (74 O.S. §85.10 and OAC 260:115-3-9). Bidders claiming any portion of their Proposal Response as proprietary or confidential must specifically identify which documents or portions of documents they consider proprietary or confidential and submit an additional copy of their Proposal Response with this information highlighted OHCA shall make the final decision as to whether the documentation or information is proprietary or confidential.
2. If OHCA determines the information is not confidential or proprietary, the Bidder has the option of withdrawing their Proposal Response.

Section III: Evaluation and Award

A. Evaluation

OHCA will evaluate proposals against the evaluation criteria based on the items and weights shown below and in accordance with the “best value” determination as defined in 74 O.S. § 85.2.

		Value
Form 1	Proposal Cover Page	Pass/Fail
Form 2	Checklist	Pass/Fail
Form 3	Corporate Stability and Resources	10
Form 4	Contractor’s Price Proposal and Milestone Schedule	30
Form 7	Bidder’s Proposed Scope of Work, OHCA Responsibilities	40
	Interviews	20
	TOTAL	100

B. Proposal Response

The Proposal Response is scored by an Evaluation Committee as follows:

1. Items scored with a Pass/Fail may be reviewed by the Evaluation Committee.
2. The Evaluation Committee scores the Bidder's Submitted Proposal Package (Forms 1 – 7) in accordance with the Evaluation Plan.

C. Interviews

1. OHCA may ask some or all Bidders to participate in interviews. If only some Bidders are invited, OHCA will invite Bidders with the highest evaluation scores. Interviews will focus on the Bidder's plans for the project and understanding of the organization and individuals.
2. OHCA may interview key personnel for this solicitation. Individuals being interviewed are required to provide a one-page resume highlighting their experience and accomplishments. Resumes shall be submitted to the Contract Coordinator when a Bidder is invited to participate in an interview.
3. Bidders must ensure that all designated staff is available on the interview date shown on the RFP Cover Sheet before submitting a response. At its sole discretion, OHCA may allow substitutes, proxies, phone interviews or other distance interviews. Bidders that wish to use any of these options should contact the Contract Coordinator listed on the RFP Cover Sheet.
4. OHCA will interview individuals separately or may interview as a group. No other individuals may participate or attend the interview unless invited by OHCA. Interviews will generally last 10-30 minutes.
5. OHCA may request additional information from Bidders prior or subsequent to interviews.

D. Post Interview Contracting Process

1. OHCA will invite selected Bidder(s) to conduct a Proposal Presentation onsite at OHCA. Being invited to present the Proposal does not constitute contract award. Either OHCA or the selected Bidder(s) may discontinue the contracting process at any time. All proceedings remain confidential during the contracting process and no information will be provided to other Bidders until Contract Award.
2. Proposal Presentations provide an opportunity for the Bidder(s) to present its plan in greater detail and refine their Submitted Response (See Forms 1 – 7). It is not a negotiation period and the Bidder(s) cannot modify its cost proposal unless OHCA and the Bidder agree to scope or requirement changes. The presentation shall not materially change the scope of the RFP or the information contained in the proposal response. OHCA and the Bidder may also discuss and approve proposed Modifications during the Oral Presentation.
3. OHCA may ask the Bidder to provide supporting documentation for any information in the proposal before the meeting or at any time until Contract Award. Coordination prior to award may also include other meetings and teleconferences as needed.
4. At least a week prior to the Proposal meeting, the Bidder shall email electronic copies of their presentation that will be used;
5. This presentation shall include:
 - a. Key articles of the Bidder's approach;
 - b. All project and implementation planning;

- c. A detailed statement showing how Bidder will meet all requirements and complete required tasks shown in the Scope of Work;
 - d. Any concerns and issues related to Scope of Work or Proposed Modifications;
 - e. Any additional OHCA responsibilities proposed by the Bidder; and,
 - f. How the Bidder will maximize achievement of the RFP objectives.
6. All key participants and stakeholders should be present at the meeting, and have the opportunity for input, to secure the success of the contract.

E. Award

1. OHCA will notify the Bidder chosen for Contract Award and will send the Bidder the “*Contract between the OHCA and the Contractor.*” No work under the Contract should begin before receipt of the Purchase Order. The PO shall be issued by the OHCA upon execution by both parties of the “*Contract between the OHCA and the Contractor.*”
2. The selected Bidder is encouraged to begin the process of registration with the Oklahoma Office of Management and Enterprise Services (OMES) – Central Purchasing Division (CPD) at the start of the Post Interview Contracting Process as it may take several weeks to complete. Registration is required prior to contract award and prior to each renewal of an award. Once registered, vendors are automatically notified of bidding opportunities in the categories for which they register. Registration may be completed online by using the following link:
http://www.ok.gov/DCS/Central_Purchasing/Vendor_Registration/index.html
3. The selected Bidder is also encouraged to begin registration with the Secretary of State at the start of the Coordination Phase. In accordance with 74 Okla. Stat. §85.5 N., the Contractor must register with the Secretary of State prior to contract award or must provide a signed statement that provides specific details supporting the exemption the Contractor is claiming. { www.sos.state.ok.us or (405) 521-3911 }.
4. Prior to contract award, the selected Bidder is required to provide a certificate of insurance showing proof of compliance with the Worker’s Compensation Act or a signed statement providing specific details supporting an exemption from the Compensation Act; (Note: Pursuant to Oklahoma Attorney General Opinion #07-8, the exemption from 85 Okla. Stat. §2.6 only applies to employers who are natural persons, such as sole proprietors, and does not apply to employers who are entities created by law, including but not limited to corporations, partnerships, and limited liability companies).
5. OHCA may award the Contractor to more than one Bidder by awarding the Contract(s) by item or groups of items, or may award the Contract on an ALL OR NONE basis, whichever is deemed by the OHCA to be in the best interest of the State of Oklahoma.

Section IV: Terms and Conditions

1. General:

OHCA’s standard terms and conditions for professional services contracts are included in the RFP Library in the Terms and Conditions Document. Bidders may request changes in these terms and conditions, but OHCA may decline any request. Bidders are cautioned that the Oklahoma State Purchasing Director, based on provisions in the Oklahoma Constitution, has directed state agencies to refuse most

terms limiting a vendor's liability. If the Bidder refuses to accept the standard terms and conditions included in the Terms and Conditions Document, OHCA may decline to award a contract to that Bidder at its sole option.

2. **Debriefing:**

Bidders may request copies of proposals and evaluation and award materials after the Contract has been awarded. Due to limited staff time, OHCA is unable to provide formal debriefings for any Bidder.

3. **Protest:**

This Contract shall be awarded pursuant to 74 O.S. §85.5 T which allows Oklahoma state agencies to award contracts without involvement from the Office of Management & Enterprise Services under certain conditions. Protests of awards under this provision are handled by OHCA in accordance with administrative rules found at OAC 317:2.