

## Member Census RFP: Proposal Evaluation Criteria

### 1) RFP Processes Outline

The "Evaluation Plan" for the Access Health CT Member Census RFP is composed of the following:

- Evaluation Processes
  - a) RFP receipt process
  - b) Initial RFP screening
  - c) Evaluation team members
  - d) Vendor presentation process
- Evaluator Rating Sheet
- RFP (distributed in separate document)

Issuance of this RFP does not guarantee that Access Health CT will award a Contract to any Responder. Access Health CT reserves the right to withdraw, re-bid, extend or otherwise modify the RFP or the related schedule and process, in any manner, solely at its discretion.

Access Health CT also reserves the right to:

- Consider any source of information in evaluating Proposals;
- Omit any planned evaluation step if, in Access Health CT's view, the step is not needed;
- At its sole discretion, reject any and all Proposals at any time; and
- Open Contract discussions with the second highest scoring Responder, if Access Health CT is unable to reach an agreement on Contract terms with the highest scoring Responder.

### 2) RFP Receipt Process

Below please find a schedule of key dates and milestones for this RFP process.

Activity	Date
RFP Issued (open for 14 days)	April 30, 2014
Proposal Due Date	May 13, 2014
Oral Presentations for RFP finalists	May 19-21, 2014
Vendor Selection	May 23, 2014

All RFP submissions need to adhere to the following list of requirements and guidelines.

1. The Responder's proposal should consist of the following sections (as outlined in the RFP), in the order listed below:
  - a) Cover Letter
  - b) Table of Contents
  - c) Executive Summary
  - d) Organizational Qualifications
  - e) Approach and Methodology To Address Items Detailed In Scope of Work
  - f) Data management process
  - g) Insurance and Indemnification
  - h) Records/Intellectual Property
  - i) Notice of Special Compliance Requirements
  - j) Proposed Project Timeline to Meet Key Dates
  - k) Cost/Pricing Proposal
  - l) Biographical Sketches for Key Personnel
  - m) 3 References
2. The proposal was to be formatted as follows:
  - Paper size: 8.5 x 11 inches
  - Minimum font size: 11 point (except for footnotes, headers, or footers)
  - Ready for printing: All electronic files submitted will be pre-formatted for printing
  - Software: All electronic files submitted should be created (or fully compatible) with any of the following software suites or packages: Microsoft Office 2010, Adobe PDF.
3. The Responders were required to submit:
  - One (1) digital copy of the proposal
4. The official contact for the purposes of this request is:

Kecia Stauffer  
The Connecticut Health Insurance Exchange D/B/A Access Health CT  
280 Trumbull Street, 15<sup>th</sup> floor  
Hartford, CT 06103  
860-757-5315 (Phone)  
[kecia.stauffer@ct.gov](mailto:kecia.stauffer@ct.gov) (Email)
5. The deadline for submitting responses to this RFP is **Tuesday, May 13, 2014 by 5:00 pm EST.**

### **3) Initial RFP Screening**

---

All applications received before the deadline are to be opened by the official contact and reviewed against the checklist in section (2) to determine if the application meets the initial requirements. All applications that meet the initial screening checklist requirements are eligible for further review.

### **4) Evaluation Team**

---

A standard team of evaluators will represent Access Health CT for the vendor presentation process, as well as the proposal evaluation and scoring processes. A list of evaluators will not be provided to respondents ahead of time, but the name and title of each evaluator will be announced at the beginning of each vendor presentation.

### **5) Vendor Presentations**

---

Once an application is received and screened for eligibility, the official contact will contact the RFP respondent to schedule the vendor presentation at the Access Health CT office. Per the RFP, these presentations must take place during the time period of May 19-21, 2014. Each RFP respondent will be given access to a projector and screen, as well as a VGA cord for connecting a laptop. Each RFP respondent will be allowed a maximum of 1.5 hours to present, and the time allotment must be established with the official contact at the time of scheduling.

DRAFT

## 6) Evaluator Rating Sheet

---

### EVALUATOR RATING SHEET

Date: \_\_\_\_\_

Vendor Name: \_\_\_\_\_

Evaluator Signature: \_\_\_\_\_

#### **INSTRUCTIONS:**

At the end of each vendor presentation, each evaluator must complete the following evaluation rating sheet, sign and date above, and return both sheets to the Official Contact.

The Evaluator must assess each section of the rating components below to determine to what extent the information provided exceeds, meets, somewhat meets or does not meet project deliverables. Each section of the evaluation sheet corresponds with information requested in the written RFP process, as well as information presented during the in-person vendor presentations.

Evaluators will assign a rating (point values for each criterion) based on their assessment. The maximum points allowed for each criterion are listed.

## EVALUATION RATING SHEET

SECTION	DESCRIPTION	MAX POINTS	RATING
<b>A</b>	<b>Background and qualifications</b> This includes, but is not limited to: <ul style="list-style-type: none"> <li>• Summary of past projects which provide evidence of being able to successfully perform this work</li> <li>• Experience in healthcare and health insurance research</li> <li>• Examples of work with evaluating large populations</li> <li>• Agency staffing plans</li> </ul>	<b>10</b>	
<b>B</b>	<b>Technical Expertise</b> This includes, but is not limited to: <ul style="list-style-type: none"> <li>• Credentials of staff assigned to this project</li> <li>• Capabilities of the firm</li> <li>• Ability to meet AHCT's privacy and security standards</li> </ul>	<b>25</b>	
<b>C</b>	<b>Proposed Analytics</b> This includes, but is not limited to: <ul style="list-style-type: none"> <li>• Choice of method for analysis</li> <li>• Choice of format for final deliverable(s) (i.e. models, data tables, etc)</li> </ul>	<b>15</b>	
<b>D</b>	<b>Cost Proposal</b> This includes, but is not limited to: <ul style="list-style-type: none"> <li>• Quality of the narrative supporting cost proposed</li> <li>• How competitive cost is</li> </ul>	<b>30</b>	
<b>E</b>	<b>Creativity of Approach</b> This includes, but is not limited to: <ul style="list-style-type: none"> <li>• Choice of methods for targeting hard-to-reach populations</li> </ul>	<b>20</b>	
<b>Total Score</b>		<b>100</b>	