

REQUEST FOR PROPOSALS

For

Actuarial and Contract Negotiation Services

issued by

COMMUNITY BEHAVIORAL HEALTH

Date of Issue:
February 2, 2022

Applications must be received no later than
2:00 P.M. on February 22, 2022

All questions related to this RFP should be submitted via e-mail

to: Hans Leach at hans.leach@phila.gov

**EQUAL OPPORTUNITY / AFFIRMATIVE ACTION EMPLOYER – WOMEN,
MINORITY INDIVIDUALS AND PEOPLE WITH DISABILITIES ARE
ENCOURAGED TO RESPOND**

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1. Project Overview

1.1. Introduction/Statement of Purpose

Community Behavioral Health (CBH) is issuing this Request for Proposals (RFP) to contract with a qualified, independent vendor who specializes in Actuarial Services. It is the intent of this RFP to solicit proposals from all interested vendors possessing expertise within the guidelines established in this RFP. The CBH Finance department will be managing the contract.

1.2. Project Background

The purpose of this CBH Request for Proposal is to solicit proposals from interested healthcare consulting firms with documented expertise in conducting year-round actuarial services. Further, the selected firm will participate in contract negotiations with the Pennsylvania Department of Human Services (PA DHS). All the requirements are specified in the scope of work section (Section 2.2. Services to be Provided/Required Tasks of this RFP).

1.3. Request for Proposals

CBH anticipates selecting one firm to provide all the services specified in this RFP.

1.4. General Disclaimer

This RFP does not commit CBH to award a contract. This RFP and the process it describes are proprietary and are for the sole and exclusive benefit of CBH. No other party, including any Applicant, is intended to be granted any rights hereunder. Any response, including written documents and verbal communication, by any Applicant to this RFP, shall become the property of CBH and may be subject to public disclosure by CBH.

2. Scope of Work

2.1. Project Details

The overall objective of this RFP is to identify a qualified, independent third party firm to provide year-round actuarial services and participate in the contract negotiations with PA DHS.

2.2. Services to be Provided/Required Tasks

More specifically, Community Behavioral Health is seeking a firm to provide the following services:

- Provide a quarterly actuarial opinion of CBH's medical claims liability as of the last day of each calendar quarter as required under PA DHS HealthChoices Behavioral Health Program. The opinion is required within 35 calendar days after the last day of each calendar quarter.
- Provide supporting documentation and information to independent auditors, regarding the actuarial opinion of CBH's medical claims liability as of the last day of the calendar year.

- Participate in the annual capitation rate development process:
 - Review and analyze PA DHS materials related to rate process
 - Perform special studies related to specific rate issues
 - Assist in development of rate projection
 - Review capitation rate proposal to PA DHS
 - Participate in rate meetings with PA DHS when requested
 - Complete PA DHS Capitation Rate Calculation Sheets (CRCS)
- Provide assistance with other projects related to research, analysis, rate development or other issues as requested

2.3. Monitoring

The CBH Finance Department will be managing the contract. An individual from that unit will be identified as the point person for the work to be conducted under the contract that is developed through this RFP and will monitor those activities for the duration of the contract.

2.4. Reporting Requirements

Written progress reports will be required on a mutually agreed upon periodic basis to document the progress of the work to be performed, but will be no less frequent than bi-monthly. In addition, CBH may request additional reports over the course of the contract.

2.5. Compensation/Reimbursement

A cost proposal must be provided based upon your best understanding of the scope of the project and the services to be delivered. This should be presented as the total cost, itemized by each phase of the project (i.e. expected project deliverables detailed in Section 2.2.), and further by a detailed list of charges for services, including hourly personnel rates for all staff assigned to this project, subcontractor fees, reimbursable expenses and other miscellaneous costs and fees. Services for the proposed project will be reimbursed as they are incurred through submission of invoices to CBH.

While CBH may award a contract based on the initial offer, an Applicant should make its initial offer on the most favorable terms available. CBH reserves the right, however, to have discussions with those potential consultants falling within a competitive range, and to request revised pricing offers from them and to make an award or conduct negotiations thereafter.

2.6. Organization and Personnel Requirements

CBH is seeking a firm with the requisite skills and abilities to perform the work being sought through this RFP. The selected firm must have at least five (5) years of experience providing actuarial services, related work. Applicants should include any credentials from any certifying organization that attest to the capabilities of the organization or of any of the individuals employed by the organization that will be working on the proposed project. The actuary assigned to the CBH account must be a Fellow of the Society of Actuaries (F. S. A.) or an Associate of the Society of Actuaries (A. S. A.) and a Member of the American Academy of Actuaries (M. A. A. A.).

2.7. Technology Capabilities

Applicants must have the technology capabilities required to perform the proposed activities in this RFP. At a minimum, Applicants must have the computer hardware and software capabilities to extract, transform, load and manipulate large data sets in excess of 35 million rows.

3. Proposal Format, Content, and Submission Requirements; Selection Process

3.1. Required Proposal Format

3.1.1. Format Structure

3.1.1.1. Proposal Cover Sheet

The cover sheet (see Attachment A) should be completed with the Applicant's information and included as the first page of the proposal.

3.1.1.2. Table of Contents

A table of contents should be included as the second page of the proposal with each section of the proposal included and with a page number for the first page of each section.

3.1.1.3. Format Requirements

Proposals must be prepared simply and economically, providing a straightforward, concise description of the Applicant's ability to meet the requirements of the RFP. Each proposal must provide all the information detailed in this RFP using the format described below. The narrative portion of the proposal must be presented in print size of 12, using a Times New Roman font, single spaced on 8.5" by 11" sheets of paper with minimum margins of 1". For each section where it is required, the Applicant must fully answer all of the listed questions in the outline form in which they are presented in the RFP. Answers to each question must be numbered/lettered and correspond to the numbered/lettered questions in this RFP. Failure to number and letter the questions or to respond to all questions may result in the proposal's being considered non-responsive. Each attachment, appendix or addendum must reference the corresponding section or subsection number.

Applicants are required to limit their narrative responses to ten (10) single-spaced pages. This page limit includes sections 3.1.2.1. – 3.1.2.5. below. There are no limitations for the cost proposal and operation documentation requirements, sections 3.1.2.6. and 3.1.2.7. If you have responded to a requirement in another part of your proposal, make reference to that section and do not repeat your response. Applicants whose narrative exceeds ten (10) single-spaced pages may have their proposals considered non-responsive and be disqualified.

3.1.2. Proposal Content

The proposal should follow the format below. Information should be complete and demonstrate that the consultant can perform the required work in a professional manner.

3.1.2.1. Applicant Profile/Statement of Qualification/Relevant Experience

Provide company contact information, including how long you have been in business, and the specific services you provide. Please provide a brief narrative description of the purpose, corporate status (profit or non-profit), and organizational structure of the company. Organizational charts may be used to support appropriate aspects of this narrative and included as an attachment to your proposal. Identify and briefly describe related work completed in the last three years. Describe only work related to the proposed effort and include any examples of similar work in governmental, non-profit or human services related organizations. Include evidence of satisfactory and timely completion of similar work performed for past projects.

3.1.2.2. Project Understanding and Proposed Scope of Work

Prepare a brief introduction including a general demonstration of understanding of the scope and complexity of the required work. Provide a description of how the proposed services will be provided. Please include a description of each item identified in the scope of work section (Section 2.2.) and describe creative solutions and alternative approaches where feasible. Please describe how you would prefer work be developed, shared, mutually agreed upon, and assessed by CBH.

3.1.2.3. Personnel

Identify key personnel who will be assigned to this project. Detail their experience in work related to the proposed assignment. Specify the Project Manager who will serve as a contact person. Provide resumes and job descriptions for all individuals proposed to participate in the project. Provide copies of certifications of any individual whose job description requires a certification. In this section, also state the intention, if that is the case, to utilize subcontractors to perform any of the work for this project. For each subcontractor, provide the name and address of the subcontractor, a description of the work the subcontractor will provide, and whether the subcontractor will assist in fulfilling the goals for inclusion of minority, woman, or disabled owned businesses.

3.1.2.4. References

Please include references with contact information from at least three organizations that have used your organization's services in the past three years and have been customers for a minimum of 12 months.

3.1.2.5. Project Plan and Timeline

Provide a description of the project plan and timeline for providing the actuarial and related services being sought through this RFP. Please note that the desired training timeframes are discussed in Section 2.2. Services to be Provided/Required Tasks.

3.1.2.6. Cost Proposal

Please provide a cost proposal based upon your best understanding of the scope of the project and the services to be delivered. This cost proposal should include the total estimated cost for this project, itemized by the expected project deliverables detailed in section 2.2. This cost proposal should also include the provision of a detailed list of charges for services. The list of services should include, but not be limited to:

- a. Hourly personnel rates for all staff assigned to this project
- b. Fees for subcontractors
- c. Reimbursable rates for expenses such as printing, copies, etc.
- d. Other miscellaneous costs and fees

Final rates will be determined in negotiations with the qualified Applicant after the proposal submissions have been reviewed and contract negotiations have begun. Although CBH may begin contract negotiations based on the submitted proposal, CBH reserves the right to have discussions with those Applicant(s) falling within a competitive range and to request revised pricing offers from them and to make an award or conduct negotiations thereafter.

3.1.2.7. Operational Documentation and Requirements

Please make sure to include completed and signed (where applicable) attachments with your submission:

- Attachment A: CBH Administrative RFP Response Cover Sheet
- Attachment B: City of Philadelphia Tax and Regulatory Status and Clearance Statement
- Attachment C: City of Philadelphia Disclosure Forms (forms attached separately as a .pdf)
- Attachment D: City of Philadelphia Disclosure of Litigation form
- Attachment E: Acknowledgement of CBH Administrative Procurement Terms and Conditions

Additionally, in this section, please include the following information, either within the section itself or by reference to an attachment to your proposal:

- Tax Identification Number
- Letter attesting that all required federal, state and local taxes (including payroll taxes) for the past twelve (12) months have been paid

- In the case of for-profit organizations, group or individual practices, disclosure of any person or entity holding any shared ownership or controlling interest of 5% or more.
- MBE/WBE/DSBE Status – For-profit Applicants

3.2. Selection Process

An application review committee will review all responses to this RFP. Based on the criteria detailed below, the committee will make recommendations concerning the submissions that are best able to meet the goals of the RFP.

Submissions will be reviewed based upon the merits of the written response to the RFP.

Specific scoring criteria upon which the review will be based include:

3.2.1. Threshold Requirements

Threshold requirements provide a baseline for all proposals, which means they provide basic information that all Applicants must meet. Failure to meet all of these requirements may disqualify an Applicant from consideration through this RFP. Threshold requirements include timely submission of a complete application with all sections outlined in 3.1.2.7. completed. Threshold requirements include having the requisite experience and qualifications to implement the program, and being a vendor in good standing with the City and CBH.

Threshold requirements also include consideration of the Applicant’s financial status, including any potential delinquencies to the City and CBH. Proposals may be rejected, if, in CBH’s judgment, the Applicant has failed to provide all information required by this RFP; has been delinquent or unfaithful in the performance of any contract with CBH or others; is delinquent, and has not made arrangements satisfactory to CBH with respect to the payment of City taxes or taxes collected by the City, or other indebtedness owed to the City or other taxing authorities; is not in compliance with regulatory codes applicable to Applicant; is financially or technically incapable; or is otherwise not a responsible Applicant.

CBH reserves the right to conduct investigations with respect to financial, technical and other qualifications, and references without notice to the Applicant.

3.2.2. Scoring by Review Committee

Applicants that do not meet all the threshold requirements may have their proposals disqualified. For Applicants meeting the threshold requirements, the scoring criteria for this RFP upon which the review will be based are as follows:

- Demonstrated qualifications and relevant experience **(20 pts.)**
- Demonstrated understanding of the project as indicated by a description of each item in the scope of work section **(20 pts.)**

- Appropriateness of project approach and effectiveness of proposed project plan and timetable (20 pts.)
- As stated in the cost proposal section, likelihood that the proposal will provide the best value compared to other submitted proposals (20 pts.)
- Appropriateness of staffing to complete the project (10 pts.)

3.2.3. MBE-/WBE-/DSBE-owned and Local Businesses

Special consideration will be given for the following:

- Businesses owned and controlled by minorities, women, and disabled persons
- Philadelphia based Applicants

4. Proposal Administration

4.1. Procurement Schedule

The anticipated procurement schedule is as follows:

RFP Event	Deadline Date
RFP Issued	February 2, 2022
Deadline to Submit Questions	February 10, 2022
Answers to Questions on Website	February 15, 2022
Application Submission Deadline	February 22, 2022 @ 2PM EST
Applicants Identified for Contract Negotiations	March 11, 2022

CBH reserves the right to modify the schedule as circumstances warrant.

This RFP is issued on **February 2, 2022**. In order to be considered for selection, all applications must be delivered to the e-mail address below **no later than 2:00 PM EST on February 22, 2022**.

- Application e-mails should be titled “**Actuarial Services RFP**” Applications submitted by any means other than submission to the e-mail below will not be accepted.
- Applicants must submit an electronic version of the application prepared as a PDF document – please e-mail to hans.leach@phila.gov.
- Applications submitted after the deadline date and time will be returned.
- The individual Applicant or an official of the submitting agency, authorized to bind the agency to all provisions noted in the application, must sign the cover sheet of the application (See Attachment A).

4.2. Questions Relating to the RFP

All questions concerning this RFP must be submitted in writing via email to Hans Leach at hans.leach@phila.gov by February 10, 2022. CBH will respond to questions it considers

appropriate to the RFP and of interest to all Applicants, but reserves the right, in its discretion, not to respond to any question. Responses will be posted on the CBH website by February 15, 2022. Responses posted on this website become part of the RFP upon posting. CBH reserves the right, in its discretion, to revise responses to questions after posting, by posting the modified response. No oral response to any Applicant question by any CBH employee or agent shall be binding on CBH or in any way considered to be a commitment by CBH. *Contact regarding this RFP with CBH or related staff other than the individual named above, is not permitted and failure to comply with this restriction could result in disqualification.*

4.3. Interviews/Presentations

Applicants may be required to make an oral presentation concerning various aspects of their application to CBH. Such presentations provide an opportunity for Applicants to clarify their application to ensure a thorough and mutual understanding. CBH will schedule such presentations on an as-needed basis.