KERN HEALTH SYSTEMS

REQUEST FOR PROPOSAL

SUBMISSION CHECKLIST

Kern Health Systems (KHS) is a government agency dedicated to running a fair bidding program to foster high quality business relationships. In preparing an RFP response, please bear the following in mind:

1. This RFP is not an offer. It is a request for proposals. KHS may reject all proposals at its convenience without any liability to proposers.
2. There is a deadline for submitting questions to KHS about this RFP.
3. There is a deadline for submitting bids to KHS.
4. Every bid package must include:
    a. Indemnification letter for Confidential and Proprietary information
    b. Answers to questions in Attachment A
    c. Answers to questions in Attachment B
    d. Answers to questions in Attachment C
    e. Signed copy Attachment D
    f. Signed copy of Attachment E

KERN HEALTH SYSTEMS

2900 Buck Owens Blvd

Bakersfield, CA 93308

Request for Proposal

Professional Services Agreement

To

Project Portfolio Management Solution

October 14, 2020

Proposal Deadline:

November 2, 2020 2:00 PM PST

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A. INSTRUCTIONS AND CONDITIONS

1. Definitions
   a. As used herein, "RFP" means "Request for Proposal."
   b. As used herein, "KHS" means "Kern Health Systems."
2. Preparation of Responses (Instructions to Bidders)
   a. Before submitting a Proposal, each Bidder is expected to thoroughly examine the specifications in the Attachments, and all other related contractual documents included in this RFP, including subsequent amendments to the RFP. Failure to do so will be at the Bidder's risk, and will not bar the Bidder's obligation to perform if a contract is awarded pursuant to this RFP.
   b. Each Bidder shall submit, as part of their Proposal, completed copies of Attachments "D", Proposal Signature Verification, and "E" Non-Collusion Declaration.
   c. Each Bidder shall complete Attachments A, B, and C according to the instructions on each of the attachments.
   d. Each Bidder must be satisfied by personal examination and by such other means as it may prefer, as to the actual conditions and requirements under which the contract will be performed.
   e. KHS' standard Professional Service Agreement (PSA) will be used to contract with the chosen vendor. A blank template is included with this RFP package. Any objections to the terms and conditions stated in that document must be clearly explained and included with the bid package as an additional Attachment F
3. Explanation to Bidders
   a. If a Bidder desires an explanation of any kind regarding provisions of this RFP, the Bidder must generate a written request for such explanation. The request may be e-mailed to rfp@khs-net.com, faxed to 661-664-4381, or addressed to:

   > Kern Health Systems
   > Attention Purchasing Department
   > 2900 Buck Owens Boulevard
   > Bakersfield, CA 93308

   b. Requests for explanation must be submitted by October 19th, 2020 2:00 PM PST, allowing sufficient time for a reply to reach all Bidders before the submission of their Proposals. The Purchasing Manager or duly authorized personnel will advise all candidates known to have received a copy of the RFP of each question and subsequent explanation.
4. Amendments
   a. Bidders are advised that KHS reserves the right to amend the requirements of this RFP prior to the date set for opening of bids. Such revisions will be done formally by publishing amendments to all Bidders known to have received a copy of the RFP. This may be done via fax, e-mail, or other method as determined by KHS. Amendments will be posted to the KHS website: http://www.kernhealthsystems.com/, listed under the specific RFP. If in the judgment of KHS, the change is of such nature that additional time is required for Bidders to prepare their Proposals, KHS will change the date of the Proposal opening and notify all Bidders by e-mail and it will be posted to the KHS website.
   b. Bidders are requested to acknowledge receipt of amendments to an RFP. This may be done by any one of the following means:
      1) Sign and return the amendment via e-mail or fax.
      2) Sign Attachment "D", Proposal Signature Verification.

5. Submitting Proposals
   a. **Please submit ONE (1) electronic copy. Electronic copy should be submitted via e-mail to rfp@khs-net.com.**
   b. Mailed or third-party delivered Proposals and amendments of Proposals shall be enclosed in sealed envelopes and addressed to KHS Purchasing Department, 2900 Buck Owens Boulevard, Bakersfield, CA   93308. Proposals shall be clearly identified by stating, "ATTENTION PURCHASING: Project Portfolio Management Solution shown on the outside of the envelope. Proposals and/or amendments may be hand delivered, but the foregoing information will nevertheless be required for identification purposes. KHS is not responsible for delinquent delivery issues.
   c. Faxed proposals and amendments will NOT be considered.
   d. Alternate Proposals are not authorized and will NOT be considered.
   e. **All Proposals must be received by KHS no later than November 2nd, 2020 2:00 PM PST. Late Proposals will NOT be considered or accepted. For purposes of this RFP, the official time shall be the time on the clock in the lobby of KHS front office. Participants are strongly encouraged to arrive early to avoid any discrepancy between their own watch and the official clock.**
6. Non-Collusion Declaration
   Each Bidder is required to complete the document entitled, "Non-Collusion Declaration" on the form provided herein (Attachment E).
7. Bidders Response Information
   Since KHS is a public entity, all responses may be disclosed through the Public Records Act. KHS may keep submissions and negotiations confidential until the Governing Board approves the final contract and/or a Purchase Order is issued.
8. Award of Contract
   a. Award will be made, in whole or in part, to the responsive, responsible Bidder whose Proposal is determined by KHS to be most advantageous to KHS, price, delivery, and others factors considered.
   b. KHS may reject any or all bids and may waive informalities and minor irregularities in bids received.
   c. **THE CONTRACT IS SUBJECT TO KHS GOVERNING BOARD APPROVAL.**
9. Evaluation Process
   a. The determination and final selection of the successful Bidder will be based upon evaluation by KHS considering all factors and such other criteria (subjective and otherwise) as KHS may, at its sole discretion, deem relevant. In no event will KHS be limited to selecting a Bidder based solely upon total cost submitted.
   b. Including the Total Price, the following overall factors will be considered:
      - Corporate capabilities
      - Responsiveness to RFP
      - Experience with Project Portfolio Management Solutions
      - Value-added services
      - Timeliness of service
      - Trade reference and/or referrals
      - History of compliance with government contracts and laws

c. KHS will provide special consideration to vendors located and doing substantial business in Kern County.

10. Company Evaluation

Bidders shall provide responses to the series of questions and information requested in Attachment C that will be used to evaluate the Bidder's company. Responses to individual questions/information request should be kept to a single page, except as designated.

11. Late Bids

No Proposal or Proposal Amendment received at the office designated in this RFP after the time set for receipt specified in this RFP will be considered or accepted.

12. Cost of Preparation of Bids

Costs for developing responses to this proposal are entirely the responsibility of the Bidder.

13. Withdrawal of Bids

a. Proposals may be withdrawn by letter or in person by a Bidder or an authorized representative possessing proper identification and written proof of his authority to act on behalf of the Bidder. If withdrawn in person by a Bidder or a representative of the Bidder, the person withdrawing the Proposal will be required to sign a receipt for the Proposal.

b. Withdrawal action of any type must be done before the date and time specified for opening of bids in this RFP.

14. Payment

a. Invoices for services rendered shall be directed to:
Kern Health Systems
Accounts Payable
2900 Buck Owens Boulevard
Bakersfield, CA 93308
or submitted via email to:
apinvoice@khs-net.com

b. Payment will be made upon receipt of an appropriate invoice and determination by KHS where products and/or services have been determined by KHS to be satisfactorily provided, and subject to the terms of the contract. Payment terms are Net 30 after receipt of a valid invoice. KHS is unable to take advantage of any prompt-payment discounts. KHS is not responsible for misdirected invoices.

15. Miscellaneous

a. The successful Bidder may not assign the contract or any part of its obligations without the prior written consent of KHS, which may be withheld in its sole discretion.

b. The successful bidder will enter into a "Professional Services Agreement" with KHS.

c. Bidder recognizes that the Medi-Cal Managed Care and Healthy Families programs are dynamic programs that are subject to numerous legislative and regulatory changes, which will likely require the successful Bidder to implement related changes to the agreement that may be awarded pursuant to this RFP.

16. Disposition of Proposals and Proprietary Data

All materials submitted in response to this RFP become the property of Kern Health Systems. Any and all proposals received by the KHS shall be subject to public disclosure and inspection, except to the extent the proposer designates trade secrets or other proprietary data to be confidential, after the Evaluation Committee has completed its deliberative process and either the proposer has been

informed that they are not the vendor selected by the Evaluation Committee for recommendation to the Board of Directors, or the matter has been set for consideration before the Board of Directors, whichever comes first.

Material designated as proprietary or confidential shall accompany the proposal and each page shall be clearly marked and readily separable from the proposal in order to facilitate public inspection of the non-confidential portion of the proposal. Prices, makes and models or catalog numbers of the items offered, deliverables, and terms of payment shall be publicly available regardless of any designation to the contrary. KHS will endeavor to restrict distribution of material designated as confidential or proprietary to only those individuals involved in the review and analysis of the proposals.

Proposers are cautioned that materials designated as confidential may nevertheless be subject to disclosure. Proposers are advised that KHS does not wish to receive confidential or proprietary information and that proposers are not to supply such information except when it is absolutely necessary. If any information or materials in any proposal submitted is labeled confidential or proprietary, the proposal shall include the following clause:

(legal name of proposer) shall indemnify, defend and hold harmless Kern Health Systems, its officers, agents and employees from and against any request, action or proceeding of any nature and any damages or liability of any nature, specifically including attorneys' fees awarded under the California Public Records Act (Government Code §6250 et seq.) arising out of, concerning or in any way involving any materials or information in this proposal that (legal name of proposer) has labeled as confidential, proprietary or otherwise not subject to disclosure as a public record.

17. Timeline
    The following timeline is based on KHS' requirements and will be strictly adhered to unless modified by amendment

TIMELINE:

- **October14, 2020**　　　　　**RFP release**
- **October 19, 2020**　　　　　**Bidders Questions Due (1:00PM) Please e-mail.**
- **October 21, 2020**　　　　　**KHS will e-mail responses to all Bidders**
- **November 2, 2020**　　　　　**Proposals due (2:00PM)**
- **December 10, 2020**　　　　**Final decision**
- **December 11, 2020**　　　　**Award announcement**

B. STATEMENT OF PURPOSE

This RFP contains a list of requirements for the development of a Project Portfolio Management Solution.

KHS is soliciting responses from qualified Bidders to address the stated requirements of this RFP. A qualified Bidder, for the purpose of this RFP, is one that can reliably provide the required services to KHS and perform to the satisfaction of KHS and its regulators for the entire term of the agreement.

Upon receipt of this RFP, recipients are expected to read and understand the service priorities and requirements that have been defined by KHS. Ample opportunity will be given to ask questions and receive clarification. The final Proposal submitted should include all appropriate goods and services required to satisfy the identified priorities and requirements. KHS will look to the selected vendor for technical compatibility of components and application requirements satisfaction during the entire term of the agreement.

KHS management would prefer to have an ongoing relationship with the chosen Bidder. The character and operating principles of the successful Bidder are important to KHS management. The following sections ask questions about the history and purpose of the Bidder's company. Please answer the specific questions. If additional information would be informative to KHS management, please add it to the last question in each section. Bidders should number all responses with the section letter and section number.

C. BACKGROUND INFORMATION

KHS is a public agency formed under Section 14087.38 of the California Welfare and Institutions Code. KHS began full operations on September 1, 1996. KHS serves about 260,000 Medi-Cal participants in Kern County. Medi-Cal is a jointly funded, Federal-State health insurance program for certain low-income people.

ATTACHMENT A

SCOPE OF SERVICES

Background Information

Kern Health Systems (KHS) - Project Management Office:

A Request for Information (RFI) process was originally conducted 6/30/20 to 7/17/20. Following responses from the RFI process, we have seen multiple PPM Solution demos from 9/21/20 to 10/12/20. This has enabled us to solidify our requirements for a PPM solution that best fits the needs of KHS. These requirements are detailed below for the Request for Proposal (RFP) process. Prospect bids must meet these requirements for the proposal to be considered. Following the RFP, the solution recommendation will go to the KHS Board for final approval.

As part of the RFP, vendors are requested to:
- Provide key customer case studies / experiences, in particular if available with any of the Local Health Plans or elsewhere within the Healthcare industry.
- Share relevant information for their product roadmaps that would facilitate KHS decision-making.
- Share cost models that would align with KHS requirements and facilitate decision-making.

The KHS Project Management Office is a cross – functional shared services department responsible for portfolio governance and project/program execution for the organization. Current state of processes consists of the following problems that need solving:
- Significantly manual labor-intensive portfolio management process end to end - proposals, prioritizations, analytics, dashboard development/tracking, scenario planning, schedule development, resource estimations/capacity management and limited reporting capabilities, which consumes excessive hours of work by multiple employees. Each year the planning summary has to be re-built from scratch and with manual processes, has led to human errors and increase in reconciliation processes.
- Lacks in automations incurring inefficiencies for overall processes (i.e. time spent to do portfolio planning, time spent for interactions across teams/departments, time that could have been allocated for other work priorities). This has made it more prone to human error for data accuracy and incurring excessive time for manual reconciliations.
- Excel-based planning has no clean integration with Team Foundation Server (TFS - foundational Business Intelligence platform at KHS), where tasks and hours are managed for the KHS Agile delivery processes. Process to extract data from TFS is manual and compiled within Excel reporting.
- Due to management spending excessive time for the manual portfolio management processes has caused valuable time to be taken away from managing the staff and the department functions.

Statement of Work - Considerations:

Solution Requirements:

Category	PPM Solution Requirements
Portfolio Document Storage	- Provide flexibility for attachment of and document storage related to portfolios and associated with specific projects
What-If Scenario Planning (Portfolio Level)	- On demand scenario planning at the portfolio level - Enables opportunity analysis in business case stage, which can later get applied to what-if-scenario planning - Provides end-users ability to forecast based on different criteria (schedule, cost, resources, other)
Agile Portfolio Management	- Flexibility to flag a project as following Agile methodology within the portfolio - Ability to apply Agile methodology principles, roles and acumen across the portfolio
Flexible Portfolio Intake Process	- Provide customizable portfolio intake process where project proposals can be submitted and specifically for any project type - Ability for business case development during intake process - Ability to do a preliminary scoring of the proposed project during intake - Ability to triage based on project categories (i.e. corporate level, department level, other) - Ability to drill into project data from portfolio intake - Ability to provide notifications for portfolio intake - Ability to attach documents during portfolio intake - Ability to set required checklist for intake before proceeding to the next step
Flexible Portfolio Workflows	- Provides portfolio management to fit any project type - One universally accessible system - Standard practices in place, to manage projects of any nature across entire organization - Can provide an audit trail for workflows
Link Portfolio to Organizational Strategy (i.e. through Portfolio Metrics, Measurements, Dashboard Views, Reporting)	- Ability to link projects in a portfolio to strategic goals - Provide ability to measure portfolio through use of key organizational metrics - Provide ability to view portfolio trends through Dashboard views - Provide Dashboard views customizable for project categories (i.e. corporate level, department level, …) - Provide standard Portfolio reports - Provide real-time audience-specific views for Executives/management

Category	PPM Solution Requirements
	- Provides various roadmap views (i.e. Agile portfolio view, performance views based on schedule/cost/effort, …)
Portfolio Prioritization	- Provide capability to prioritize projects cross-functionally across an organization by leveraging an automatically generate prioritization criterion - Provide capability to do preliminary scoring at portfolio intake stage - Provide executive override capabilities for prioritizations - Provide various prioritization templates to give different scenarios for portfolio prioritizations with comparisons against baseline and providing a "health score"
Resource Capacity Management (Portfolio Level)	- Provide resource estimation during portfolio planning - Provide resource scenario planning capabilities during portfolio planning and ability to produce "heat map" (graphical or chart view) demonstrating resource scenarios and issues/risks to be flagged - Enable easy allocation of specific resources – existing or new - to each project based on efficient resource utilization mechanisms - Ability to identify a surplus or deficit in resources at portfolio level, both in portfolio planning and once projects approved for a portfolio - Ability to report on resource capacity trends, variance analytics and flag risks
Automated and Scheduled Reminders and Notifications (Portfolio Level)	- Provide automated and scheduled reminder alerts to ensure better performance management (i.e. trigger notification to all responsible parties enabling better portfolio control and oversight)
Portfolio Collaborations	- Ability to communicate in real-time from within the PPM application - Ability to share insights and updates instantaneously, alongside projects and tasks to enable a single source of truth for all PPM-related information - Improve efficiencies, eliminating need for protracted forms of communication (e.g. long email threads and physical meetings that occur in isolation, potentially leading to disconnects) - Ability to collaborate and notify from multiple areas within the PPM application

Portfolio Reports	- Enable timely generation of reports (i.e. scheduling)
	- Produce reports that:
	  ▪ Show how projects under management are progressing and demonstrating value, maintaining executive support and keeping on track
	  ▪ Out-of-the-box reports that enable hitting the ground running
	  ▪ Custom reporting content to suit specific requirements

Category	PPM Solution Requirements
	■ Produce real-time reports for Executives/management based on key data elements ■ Provide "health score" of projects within a portfolio ■ Configurability to slice/dice data for reports based on schedule, cost, quality or other factors - Enable extract of reports to Executive-friendly or Business-friendly formats (e.g. PDF, PowerPoint, …)
Portfolio Change Control and Risk Management	- Enables trending of Change Control requests at the portfolio level, understanding causes, flagging any risks related to Change Control, user-friendly dashboard views and reporting for these trends - Ensuring comprehensive risk management functionality integrated within the PPM solution enabling identification, forecasting, monitoring and controlling of risks throughout the portfolio lifecycle - Enabling notifications from a collaboration space for Change Control and Risks
Project Management Solutions (to replace MS Project)	- Provides project management solution capabilities to replace need for use of Project Web Access/MS Project applications and house all PPM capabilities into one platform
Strategic IT Requirements	- Team Foundation Server integration - Reconciliation of people resource hours (actuals vs. forecast, revisions) - Managing to environment availability / broader systems impacts - Maintenance & upgrade needs - Import/export from Excel or Access applications - IT administrative tools
Base Technical Requirements	- Required: Windows OS 2019 or newer - Required: SQL DB 2019 or newer - Required: Single Sign On capabilities with Active Directory - Required: Integration with MS Project Server, Project Web Access and SharePoint (version 2013 or newer) – to provide flexibility if utilization of these platforms continued - Required: Integration with Microsoft Project and Microsoft Excel (O365 on premise) - Required: Ability to support database replication - Required: Ability to have access to database - Required: Ability to have read/write access - Required: Integration with Team Foundation Server (version 2018 or newer) - Preferred: Integration capabilities with API functions
Licensing	- Concurrent / main user licensing (PMO, BI, IT)

Category	PPM Solution Requirements
	- Read only (for business) - Read/write (PMO, MIS) - Administrative (IT) - Maintenance and upgrade benefits - Online / phone support services from vendor
Hosting	- Flexibility for cloud-based or on prem hosting

Additional Background Information - Kern Health Systems' Responses to RFI Questions:

1. For Licensing: How many users for of each type listed in the RFI?
   a. Read Only: 400
   b. Write: 20

2. Would KHS be hosting on premise or in a KHS Private cloud (Azure, AMS, etc.) would the team be open to having it hosted if HIPAA/security compliant?
   a. Flexibility for on prem or cloud solutions
   b. Potentially, we would need to understand integration capabilities, data feeds, etc.

3. How many people would need/have Database access? (could affect training or implementation costs)
   a. We would want the ability to perform replication to our data warehouse for reporting needs.

4. Once the proposals are delivered, what are the steps and timing for the selection process?
   a. Upon receipt of vendor proposals, we will work with our Vendor Management team to outline immediate next steps and goals for the selection process.

5. When is a the final/awarded solution scheduled to begin implementation?
   a. Desired Q1 2021

6. In your RFI, a report produced in Excel was mentioned. Is it possible to provide what metrics are being tracked on the Excel report?
   a. Excel is used in various areas; the information is input into different systems. It is also a tool to present information

7. How many systems, projects, and processes are represented by the portfolio dashboard tracking effort?
   a. Systems – 4 (TFS, PWA, SharePoint, Project Server)
      Projects – 2020 (27)
      Processes - multiple
   b. Do any of the systems have innate export capability? - Yes

8. Is KHS interested in seeing the pros and cons of hosting the system at KHS vs. Online using Project Online?
    a. Yes, we would need to know version compatibility with O365 and other tools as well.

9. Does the current portfolio management operation have sufficient workforce and expertise to manage and support an on-premise (hosted) solution?
    a. Working towards enough workforce and expertise
    b. (Related question: Are you looking for a system and management personnel solution?) – Looking for a resource & capacity demand management component of the portfolio management solution. Through this component if there are workforce productivity measurement features and metrics, we are open to evaluating.
    c. (Related question: If cloud-based, there is usually a requirement to manage such environments – same issues as indicated above apply.) – We have an IT department who would manage such environments. They will determine what additional needs are.

10. Can you provide a few examples of what you envision a "custom portfolio report" to be?
    a. We can provide mock-ups (scrubbed of sensitive data) with vendors who firmly meet our solution criteria and where we have seen/can see demos of their solutions.

11. What level of online/phone support is expected by KHS of the winning bidder? (24/7 or otherwise)
    a. At minimum, during business hours, with a 4-hour SLA for critical issues.

12. How many project managers, program managers, and portfolio managers are at KHS?
    a. Centralized PMO – 2 management, 7 project managers, portfolio management currently done by manager (with analytics supported by Business Intelligence unit)

13. Regarding integration capabilities with API functions, how many and what type of 3rd party system would KHS like to integrate with?
    a. At minimum, Microsoft Team Foundation Server
    b. Would like a list of capabilities and APIs

14. Do the current IT System Engineers have any hands-on experiencing support Project Server, SQL Server, SharePoint, and Team Foundation Server?
    a. Yes, we support all our Microsoft tools on premise in our environment today.

15. What are the experience levels of Project Managers with Microsoft Project Professional and Project Server?
    a. Proficient with these applications

16. When mentioning workflows, does this include custom forms/intake forms? How is intake done today?
    a. This is done in conjunction with standard documentation used for portfolio management such as project proposals, project analytics, charters, change requests, etc.

17. It is mentioned you want to measure against organizational metrics. What are these metrics, and how are they measured today? What is falling short?
    a. Broad spectrum of metrics measured and will require detailed discussion with vendor to demonstrate – this is just a sample below at the project level:

        Project Phase:
        % initiating/planning
        % executing
        % closing (about to)
        % closed
        % future projects
        Total active
        Total in each project phase

        Project Status:
        % in red, amber or green status

        Agile Health (this is just a sampling and plenty other metrics tracked by BI team):
        % capacity utilization
        % estimated effort accuracy
        % requirements developed
        % quality of improvements

        Resource Capacity Management:
        Total FTEs to a project
        Total FTEs to a task
        Total hours to a project
        Allocated hours to a project task
        Completed hours for a project task
        Hours forecasted for a project task
        Hours variance (forecast vs. actuals) for a project task

        Project Effort
        Estimated hours total
        Estimated FTEs
        Estimated consultants
        % completed for a project task
        % forecasted for a project task

        Organizational metrics can be focused on (and this will require a more detailed discussion with the vendor) just a high-level sample list:
        - expenses (general-ledger oriented, operational, capital, labor, savings)
        - operational efficiencies
        - strategic metrics
        - regulatory measures

18. How large of a team are you looking to support?
    a. Reference question for licensing

ATTACHMENT B

SCHEDULE OF FEES

Proposal Costs (This section is derived from the Scope of Services, Attachment A)

A. Define your proposed method of reimbursement for services provided through your organization. Kern Health Systems customarily prefers itemized billing on a project basis (or as major milestones are accomplished for very large projects) with specific deadlines identified in the Proposal.

B. Please provide a summary table matrix of costs by line item including:
   1. Item description
   2. Quantities required (specify units of measure)
   3. Not-to-exceed amounts for installation or travel
   4. Target date of completion

C. List any additional costs that may be incurred in completion of this project and the circumstances that would trigger those costs.

ATTACHMENT C

COMPANY EVALUATION CRITERIA

A. Provide a "functional organizational chart" of your company. Indicate the name and experience of the Manager or Lead Employee that will be assigned to Kern Health Systems and the functional area to which this position reports. If your company is NOT a full-service consulting organization, indicate which services are subcontracted in the "functional organizational chart." The following chart is for illustration purposes only:

ABC Consulting Company

Organizational Chart
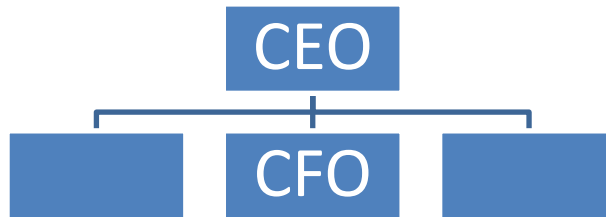
B. **IMPORTANT**: <u>Bidder's present financial statements are necessary and must be part of the Proposal submission</u>. If any type of prepayment is required, Bidder must provide company's summary of its present financial status **and** performance *for the past three years*

C. Organizational information

1. Provide a summary list of the organizational personnel that will actively participate and contribute their skills to this project. Include in this list the individual's name, job title, work location and relevant experience in projects of similar size and complexity. (Responses may be one page per individual.)

2. Provide a summary of the work plan and/or methodology and physical resources (staff and equipment) your company will commit to ensure successful project completion. (Response may be up to four pages.)

3. Summarize your company's overall project services that you are able and willing to provide.

4. Provide three current customer references of organizations currently receiving products or services similar to those proposed. Include in the reference list organization name, location, contact name and telephone number.

5. Summarize your billing procedures.

6. List the members of your organization who are authorized to negotiate Proposals/Contracts.

7. What is your company's Mission Statement?

8. How long has your company been in business?

9. Describe the educational background and experience of the key members of the project team your firm would assign to KHS' project.

10. Describe your company's experience with health insurance plans.

11. Describe your company's experience with governmental agencies (in particular, California Department of Health Care Services, California Department of Managed Health Care, and the Centers for Medicare and Medicaid Services).

12 Does your company perform audits or consulting services for any Independent Physician Associations (IPAs) or hospitals?

13. Is your firm currently under investigation or being sued by any governmental agency?   If so, describe.

14. Has your company been investigated or sued by any governmental agency over the past five years? If so, describe.

15. Has your company been sued over the last five years for services similar to those that are the subject of this RFP?

16. Has your company been the subject of a sanction, audit deficiency, settlement or Corporate Integrity Agreement under the Medicare or Medicaid Programs?

17. What is the form of your organization? (e.g., profit, not-for-profit, private, public)

18. List any shareholders who own five or more percent of the company and their percent share.

19. Describe your organization's policies, procedures and protocols to protect Protected Health Information under HIPAA, HITECH and the California Confidentiality of Medical Information Act.

 Add any information that would be useful in describing your company.

ATTACHMENT D

PROPOSAL SIGNATURE VERIFICATION

All offers in response to this RFP must be received on or before November 2nd, 2020 2:00 PM PST at the office of **Kern Health Systems, Attn: Purchasing Dept., 2900 Buck Owens Boulevard, Bakersfield, CA 93308.** All offers are subject to the attached Instructions and Conditions, general provisions, special provisions, and Attachments. The undersigned agrees, if its offer is accepted (in whole or in part) to provide products, other materials, and services as set forth in the Attachments, it shall do so in accordance with the provisions of this RFP, the controlling contract between the parties, and the master contracts between KHS and the State of California.

Offer Name: _____

Address: _____

_____

_____

Phone Number: _____

FAX: _____

Typed or printed name and title of person authorized to sign offer:

_____

Signature of Authorized Person: _____

Date of Offer: _____

Grand Total of "Attachment B": $_____

Acknowledgment of Amendments

The Offer acknowledges receipt of Amendments to the RFP numbered and dated as follows:

Amend #	Date	Amend #	Date	Amend #	Date

ATTACHMENT E

NON-COLLUSION DECLARATION

TO BE EXECUTED BY BIDDER

AND SUBMITTED WITH PROPOSAL (Mandatory)

Public Contract Code § 7106

State of California

County of Kern

The undersigned declares:

I am the _____ of _____, the party making the foregoing bid.

The bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation. The bid is genuine and not collusive or sham. The bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid. The bidder has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or to refrain from bidding. The bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit, or cost element of the bid price, or of that of any other bidder. All statements contained in the bid are true. The bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof, to effectuate a collusive or sham bid, and has not paid, and will not pay, any person or entity for such purpose.

Any person executing this declaration on behalf of a bidder that is a corporation, partnership, joint venture, limited liability company, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the bidder.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on ___[date], at ___[city], ___[state]."

_____

Signature

_____

Date