



REQUEST FOR PROPOSALS #2021-02
Contact Center Services
Publish Date: May 25, 2021

CareOregon, Inc. (“CareOregon”) on behalf of itself and Health Plan of CareOregon, Inc. (dba CareOregon Advantage), Columbia Pacific CCO, LLC, Jackson Care Connect, CareOregon dental, Housecall Providers, LLC, and Ride to Care is inviting submission of proposals for the Contact Center Services project. CareOregon also contracts with HealthShare of Oregon for Contact Center services that will be part of this project.

Closing Date/Time: June 28, 2021 - 2:00 PM, Pacific Time

Project Summary: CareOregon is looking to partner with a company to provide telephone support services to handle overflow inbound and outbound call volume. The target implementation would start in July/August 2021 with full operations beginning in September 2021. CareOregon has a preference to work with a firm that will have its employees located in the Northwest but not in the Portland Metro area.

Contact Information: The sole point of contact for procurement process or technical questions is: George Marlton, Procurement Director; marltong@careoregon.org; 503-416-4706

RFP Location: RFP Documents can be downloaded from ORPIN at the following address:

<http://orpin.oregon.gov/open.dll/welcome>, Document No. ORPIN-1247-21.

Prospective Proposers will need to sign in to download the information and that information will be accumulated for a Plan Holder's List. Prospective Proposers are responsible for obtaining any Addenda, clarifying questions, and Notices of Award from ORPIN.

ORPIN will black-out and no longer be available after June 16, 2021, after that date the only online access will be CareOregon’s website (www.careoregon.org/doingbusiness). For this reason, any addenda or posted answers to questions will only be posted to CareOregon’s website. It is the proposer's responsibility to check this website frequently for any updates.

Submission: All proposals must be emailed to Procurement@careoregon.org

CareOregon encourages proposals from Minority, Women, Service-Disabled Veteran, and Emerging Small Businesses.

****NO PROPOSALS WILL BE RECEIVED OR CONSIDERED AFTER THE ABOVE RFP CLOSING DATE/TIME****

SCHEDULE

Request for Proposals Issued..... May 25, 2021
Deadline to Submit Clarifying Questions..... June 17, 2021, 5:00 PM, Pacific Time
Request for Proposals Closing Date and Time..... June 28, 2021, 2:00 PM, Pacific Time
Anticipated Contract Start Date..... July/August 2021

SECTION 2 INSTRUCTIONS TO PROPOSERS

2.1 Modification or Withdrawal of Proposal: Any Proposal may be modified or withdrawn at any time prior to the Closing deadline, provided that a written request is received by Procurement, prior to the Closing. The withdrawal of a Proposal will not prejudice the right of a Proposer to submit a new Proposal.

2.2 Requests for Clarification and Requests for Change: Proposers may submit questions regarding the specifications of the RFP. Questions must be emailed on or before 5:00 p.m. (Pacific Time), on the date indicated in the Schedule. Requests for changes must include the reason for the change and any proposed changes to the requirements. The purpose of this requirement is to permit CareOregon to correct, prior to the opening of Proposals, RFP terms or technical requirements that may be unlawful, improvident or which unjustifiably restrict competition. CareOregon will consider all requested changes and, if appropriate, amend the RFP. No oral or written instructions or information concerning this RFP from CareOregon employees or agents to prospective Proposers shall bind CareOregon unless included in an Addendum to the RFP.

2.3 Addenda: If any part of this RFP is changed, an addendum will be published on ORPIN/CareOregon's website. It shall be Proposers responsibility to regularly check ORPIN/CareOregon's website for any notices, published addenda, or response to clarifying questions.

2.4 Submission of Proposals: Proposals must be submitted in accordance with Section 5. All Proposals shall be legibly written in ink or typed and comply in all regards with the requirements of this RFP. All Proposals must include a signature that affirms the Proposer's intent to be bound by the Proposal (may be on cover letter, on the Proposal, or the Proposal Certification Form) shall be signed. If a Proposal is submitted by a firm or partnership, the name and address of the firm or partnership shall be shown, together with the names and addresses of the members. If the Proposal is submitted by a corporation, it shall be signed in the name of such corporation by an official who is authorized to bind the contractor. The Proposals will be considered by CareOregon to be submitted in confidence. No late Proposals will be accepted.

2.5 Notice of Award: CareOregon will name the apparent successful Proposer in a Notice of Intent to Award published to the Proposers that submitted a Proposal. Identification of the apparent successful Proposer is procedural only and creates no right of the named Proposer to award of the contract.

2.6 Acceptance of Contractual Requirements: Failure of the selected Proposer to execute a contract and deliver required insurance certificates within ten (10) calendar days after notification of an award may result in cancellation of the award. This time period may be extended at the option of CareOregon.

2.7 Investigation of References: CareOregon reserves the right to investigate all references in addition to those supplied references and investigate past performance of any Proposer with respect to its successful performance of similar services, its compliance with specifications and contractual obligations, its completion or delivery of a project on schedule, its lawful payment of subcontractors and workers, and any other factor relevant to this RFP. CareOregon may postpone the award or the execution of the contract after the announcement of the apparent successful Proposer in order to complete its investigation.

2.8 RFP Proposal Preparation Costs and Other Costs: Proposer costs of developing the Proposal, cost of attendance at an interview (if requested by CareOregon), or any other costs are entirely the responsibility of the Proposer, and will not be reimbursed in any manner by CareOregon.

2.9 Clarification and Clarity: CareOregon reserves the right to seek clarification of each Proposal, or to make an award without further discussion of Proposals received. Therefore, it is important that each Proposal be submitted initially in the most complete, clear, and favorable manner possible.

2.10 Right to Reject Proposals: CareOregon reserves the right to reject any or all Proposals or to withdraw any item from the award, if such rejection or withdrawal would be in CareOregon interest, as determined by CareOregon.

Proposals may be rejected in whole or in part if they attempt to limit or modify any of the terms, conditions, or specification of the RFP or the Sample Contract.

2.11 Proposal Terms: All Proposals, including any price quotations, will be valid and firm through a period of one hundred and eighty (180) calendar days following the Closing date. CareOregon may require an extension of this firm offer period. Proposers will be required to agree to the longer time frame in order to be further considered in the procurement process.

2.12 Oral Presentations: At CareOregon's sole option, Proposers may be required to give an oral presentation of their Proposals to CareOregon, a process which would provide an opportunity for the Proposer to clarify or elaborate on the Proposal but will in no material way change Proposer's original Proposal. Any costs of participating in such presentations will be borne solely by Proposer and will not be reimbursed by CareOregon. **Note:** Oral presentations are at the discretion of the evaluating committee and may not be conducted; therefore, **written Proposals should be complete.**

2.13 Review for Responsiveness: Upon receipt of all Proposals, the Procurement Department will determine the responsiveness of all Proposals before submitting them to the evaluation committee. If a Proposal is incomplete or non-responsive in significant part or in whole, it will be rejected and will not be submitted to the evaluation committee. CareOregon reserves the right to determine if an inadvertent error is solely clerical or is a minor informality which may be waived, and then to determine if an error is grounds for disqualifying a Proposal. The Proposer's contact person identified on the Proposal will be notified, identifying the reason(s) the Proposal is non-responsive.

2.14 Communication Blackout Period: Except as called for in this RFP, Proposers may not communicate with members of the Evaluation Committee or other CareOregon employees or representatives about the RFP during the procurement process until the apparent successful Proposer is selected. Communication in violation of this restriction may result in rejection of a Proposer.

2.15 Prohibition on Commissions and Subcontractors: CareOregon will contract directly with persons/entities capable of performing the requirements of this RFP. Contractors must be represented directly. Participation by brokers or commissioned agents will not be allowed during the Proposal process. Contractor shall not use subcontractors to perform the Work unless specifically proposed or authorized to do so by CareOregon. Contractor represents that any employees assigned to perform the Work, and any authorized subcontractors performing the Work, are fully qualified to perform the tasks assigned to them, and shall perform the Work in a competent and professional manner. Contractor shall not be permitted to add on any fee or charge for subcontractor Work. Contractor shall provide, if requested, any documents relating to subcontractor's qualifications to perform required Work.

2.16 Collusion: By responding, the Proposer states that the Proposal is not made in connection with any competing Proposer submitting a separate response to the RFP, and is in all aspects fair and without collusion or fraud. Proposer also certifies that no officer, agent, or employee of CareOregon has a pecuniary interest in this Proposal.

2.17 Evaluation Committee: Proposals will be evaluated by a committee consisting of representatives from CareOregon and potentially external representatives. CareOregon reserves the right to modify the Evaluation Committee make-up in its sole discretion.

2.18 Nondiscrimination: The successful Proposer agrees that, in performing the work called for by this RFP and in securing and supplying materials, contractor will not discriminate against or treat differently, any person on the basis of race, color, religious creed, political ideas, sex, age, marital status, sexual orientation, gender identity, veteran status, physical or mental disability, national origin or ancestry, or any other class protected by applicable law.

2.19 Best and Final Offer: CareOregon may request best and final offers from those Proposers determined by CareOregon to be reasonably viable for contract award. However, CareOregon reserves the right to award a contract on the basis of initial Proposal received. Therefore, each Proposal should contain the Proposer's best terms from a price and technical standpoint. Following evaluation of the best and final offers, CareOregon may select for final contract negotiations/execution the offers that are most advantageous to CareOregon, considering cost and the evaluation criteria in this RFP.

SECTION 3 SCOPE OF WORK

3.1 INTRODUCTION

CareOregon maintains contact center services in the Portland, Oregon geographical location. Due to growth and a need for business continuity, CareOregon is looking for third party staff augmentation. We intend to partner with a company to provide telephone support services to handle inbound and outbound call volume. Together, this partner will help position CareOregon to respond quickly and accurately to ongoing business needs.

For business continuity and importance of understanding regional needs, CareOregon has a preference to work with a firm that will have its contact center employees located in the Northwest (OR, WA, ID, NV, UT) but not in the Portland Metro area. The contact center can be located in another region but the dedicated employees should be in the Northwest.

CareOregon Customer Experience intends to implement a robust Contact Center staff augmentation solution and is accepting responses to this Request for Proposal (RFP). Our goals with this project are:

- Deliver a resilient and highly available solution
- U.S. based staffing
- 2-5 Agents dedicated to CareOregon line of business
- Compliance with all State and Federal regulations

The objective of this RFP is to locate a service provider that will provide the best overall value to CareOregon. While price is a significant factor, other criteria will form the basis of our award decision, as more fully described in the Evaluation Factors in Section 4. For the purposes of this document, the term “service provider” in all cases refers to the organization electing to respond to the RFP.

Vendor managed calls will typically cover items like:

- Eligibility for Medicare/Medicaid Services
- Requests for ID cards
- Primary care physician changes
- Benefit inquires

Calls that will typically be referred back to CareOregon would be:

- Escalations
- Calls where answers cannot be resolved in a timely manner
- Calls that were not covered in training.

Please direct all Technical/Specifications or Procurement Process Questions to the indicated representative referenced in the Notice of Request for Proposals and note the communication restriction outlined in Section 2.14.

3.2 BACKGROUND

Founded in 1993, CareOregon is a 501(c)(3) public benefit nonprofit company that draws nearly all its revenue from public programs such as Medicaid (the Oregon Health Plan – “OHP”), Medicare and the State Children’s Health Insurance Program (SCHIP). Coordinated Care Organizations (“CCOs”) are an Oregon innovation that integrates physical, behavioral and oral health care, and treats the whole person.

Through partnerships with our CCOs, we provide integrated managed care services. We partner with Health Share of Oregon to serve the tri-county Portland metro area. We own Jackson Care Connect and Columbia Pacific CCO. In addition to Medicare plans and CareOregon Dental lines of business, Housecall Providers delivers primary, palliative and hospice care to home-bound patients.

Our mission is building individual well-being and community health through partnerships, shared learning and innovation. Our vision is healthy communities for all individuals, regardless of income or social circumstances.

We focus on the total health of our members, not just traditional health care. In teaming up with members, their families and their communities, we help Oregonians live better lives, prevent illness and respond effectively to health issues.

We care about people

We serve Oregonians eligible for the OHP and Medicare Advantage members who have us as their health care option. But that's not all. We are a managed health care company with an overarching goal: to make world-class, high-quality health care available to all Oregon residents, regardless of income.

We support our neighbors

We know that some Oregonians are in need but don't qualify for OHP benefits. We work to strengthen the health care safety net that these Oregonians rely upon, from local health departments and community clinics to rural and migrant health centers. We partner with policy makers and legislators to improve services and provide access to quality care throughout the state, from urban centers to rural neighborhoods.

We work with first-class providers

CareOregon has built a health care delivery system that assures access to physicians and health care professionals who understand special needs and provide quality care regardless of a patient's financial resources.

We work with policy makers to ensure access

We provide OHP enrollees access to health care services in exchange for a per member, per month capitation rate. The Oregon Legislature sets this payment rate. The payments are subject to available state funding. CareOregon takes full financial risk for the health care services our members use. CareOregon, formed by safety net health care providers in the state, is a Safety Net Health Plan. Safety Net Health Plans are nonprofits that derive their revenue from public programs.

To put it simply, CareOregon ensures that members have timely access to high quality health care from a broad network of providers, and CareOregon works hard every day to keep people healthy and active in their homes and communities.

Equity, Diversity and Inclusion:

CareOregon recognizes to achieve the vision of "Healthy communities for all individuals, regardless of income or social circumstances," it must intentionally cultivate authentic member engagement, community partnerships, and recruit, retain and develop a staff as diverse as the communities it serves. CareOregon has embarked on a continuous effort to understand the effects of historical, institutional and structural oppression on the various communities represented within its membership and personnel. CareOregon strives to internally, and in partnership with other like-minded organizations across sectors, to redress policies, systems and health related environmental issues that affect healthcare disparities and inequities.

Equity, Diversity and Inclusion is a cornerstone of CareOregon's mission, vision and strategic objectives. CareOregon's priority is strengthening our communities by making healthcare work for everyone by ensuring access to a broader and more diverse network of oral, physical and behavioral health services that address the individual needs and cultural values of our members and reduces barriers to getting needed care.

It is the intent of CareOregon, through issuance of this RFP, to collaborate with like-minded firms that share the same values and that will take actual steps to embody those values in the services provided to CareOregon and its providers, members and clients.

3.3 SCOPE OF WORK

3.3.1 Scope:

CareOregon is a rapidly growing company with a member base of nearly 300,000 customers. The CareOregon workforce consists of approximately 1000 employees located remotely and in corporate offices. CareOregon has a Contact Center staff of approximately 130. Our current internal contact center takes approx. 30,000 calls per month. While most Contact Center interactions are inbound phone calls, CareOregon continues to increase its outreach efforts to provide multiple ways to communicate with our members and providers. To ensure the best outcome for the project, CareOregon is seeking a partner that will provide staff augmentation and business continuity services.

The ideal service provider will provide a hybrid service with dedicated full-time employees as first call resolution and then per minute employees that can respond to overflow call volume.

The selected vendor should anticipate two (2) full-time employees initially and the ability to scale up during peak times (December-January) to six (6) full-time employees. It is anticipated that CareOregon will need to augment the staffing level based on changing needs. Any such changes will be negotiated and the contract amended.

The successful service provider will propose and demonstrate a comprehensive solution aligned with the key business goals of providing a high level of customer service, reducing risk, and improving service efficiencies. The proposal should include all services necessary to meet the following Contact Center and business management activities and needs:

- U.S. based staffing
- Highly resilient and available
- Staffing coverage Monday through Friday 8am to 5pm (Pacific time)
- Minimum service standards of:
 - Target Service Factor of 85% of calls answered in 30 seconds
 - Abandonment rate of 5% or less
 - Average speed to answer of 30 seconds or less
- Compliance and quality control
- Reporting and business intelligence to support continual service improvement
- Data/communication security and privacy as required of State and Federal healthcare regulations and CareOregon security policies.

The service provider will:

- Propose a solution that meets the requirements above and demonstrate functionality that meets the requirements listed
- Be experts in their field, know CareOregon requirements, and propose/promote best practices
- Partner to implement the solution
- Provide ongoing support for the solution, backed by appropriate service level agreements.
- Ensure their Contact Center employees attend initial training that will take between two (2) to three (3) weeks and one (1) hour of uptraining each month.

A successful project will look like:

- Attaining the goals listed in this Section
- Completion of the project on time and within cost projections
- Implementation of project and staff augmentation services with integration into CareOregon staffing model
- Be able to offer enhanced services such as have Contact Center employees that can also provide services in Spanish.

HIPAA and HITECH Compliance

CareOregon maintains electronic Protected Healthcare Information (ePHI) for our members. CareOregon expects all its service providers to comply with all applicable regulatory requirements specified by HIPAA and HITECH that are applicable to the services being provided.

The service provider is expected to:

- Provide a third party completed HIPAA compliance report providing evidence of administrative, physical, and technical safeguards in place that meet or exceed those set forth by the HITECH act applicable to the services provided.
- Sign a HIPAA business associate agreement
- Provide a third party SOC2 audit as applicable to specific services offered

3.3.2 Work Schedule:

The target implementation would start in July/August 2021 with full operations beginning in September 2021.

3.3.3 Term of Contract: The initial term of the contract shall be for two (2) years with the option of two (2) years renewals thereafter subject to the mutual agreement of the parties. During each two (2) year term of the contract, the service fees will be locked.

3.3.4 Sample Contract: Submission of a Proposal in response to this RFP indicates Proposer's willingness to enter into a contract containing substantially the same terms (including insurance requirements) of the sample contract identified below. No action or response to the sample contract is required under this RFP. Any objections to the sample contract terms should be raised in accordance with Paragraphs 2.2 of this RFP pertaining to requests for clarification of the RFP/specifications. This RFP and all supplemental information in response to this RFP will be a binding part of the final contract.

The applicable Sample Professional Services Contract for this RFP can be found at:
www.careoregon.org/doingbusiness.

Personal Services Contract (unless checked, item does not apply)

The following paragraphs of the Professional Services Contract will be applicable:

- Article I, Paragraph 5 – Travel and Other Expense is Authorized
- Article II, Paragraph 28 – Confidentiality
- Article II, Paragraph 29 – Criminal Background Check Requirements
- Article II, Paragraph 30 – Key Persons

The following insurance requirements will be applicable:

- Commercial General Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for Bodily Injury and Property Damage.
- Professional Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for damages caused by error, omission or negligent acts.
- Automobile Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence for Bodily Injury and Property Damage.
- Cyber Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence for network security (including data breach), privacy, interruption of business, media liability, and errors and omissions.

SECTION 4 EVALUATION PROCEDURE

- 4.1** An evaluation committee will review all Proposals that are initially deemed responsive and they shall rank the Proposals in accordance with the below criteria. The evaluation committee may recommend an award based solely on the written responses or may request Proposal interviews/presentations. Interviews/presentations, if deemed beneficial by the evaluation committee, will consist of the highest scoring Proposers. The invited Proposers will be notified of the time, place, and format of the interview/presentation. Based on the interview/presentation, the evaluation committee may revise their scoring.

Written Proposals must be complete and no additions, deletions, or substitutions will be permitted during the interview/presentation (if any). The evaluation committee will recommend award of a contract to the final CareOregon decision maker based on the highest scoring Proposal. The CareOregon decision maker reserves the right to accept the recommendation, award to a different Proposer, or reject all Proposals and cancel the RFP.

Proposers are not permitted to directly communicate with any member of the evaluation committee during the evaluation process. All communication must be facilitated through the assigned Procurement Analyst.

4.2 Evaluation Criteria

Category	Points available:
Proposer's General Background and Qualifications	0-30
Scope of Work	0-35
Equity, Diversity, and Inclusion Efforts	0-10
Fees	0-25
Available points	0-100

- 4.3** Once a selection has been made, CareOregon will enter into contract negotiations. During negotiation, CareOregon may require any additional information it deems necessary to clarify the approach and understanding of the requested services. Any changes agreed upon during contract negotiations will become part of the final contract. The negotiations will identify a level of work and associated fee that best represents the efforts required. If CareOregon is unable to come to terms with the highest scoring Proposer, discussions shall be terminated and negotiations will begin with the next highest scoring Proposer. If the resulting contract contemplates multiple phases and CareOregon deems it is in its interest to not authorize any particular phase, it reserves the right to return to this solicitation and commence negotiations with the next highest ranked Proposer to complete the remaining phases.

SECTION 5 PROPOSAL CONTENTS

5.1 Vendors must adhere to submission instructions and be advised as follows:

- 5.1.1 Complete Proposals must be emailed to Procurement@careoregon.org. The subject line of the email must identify the RFP title. Proposers are encouraged to contact Procurement to confirm receipt of the Proposal.
- 5.1.2 CareOregon reserves the right to solicit additional information or Proposal clarification from the vendors, or any one vendor, should CareOregon deem such information necessary.
- 5.1.3 Proposal may not exceed a total of **25 pages** (single-sided), inclusive of all exhibits, attachments or other information.

Provide the following information in the order in which it appears below:

5.2 Proposer's General Background and Qualifications:

- 5.2.1 Description of the firm.
- 5.2.2 Credentials/experience of key individuals that would be assigned to this project.
- 5.2.3 Description of providing similar services to non-profit entities of similar size within the past five (5) years.
- 5.2.4 Describe your typical customer profile, such as size and service provided. What are your customer retention rates?
- 5.2.5 Description of the firm's ability to meet the requirements in Section 3.
- 5.2.6 Description of what distinguishes the firm from other firms performing a similar service.

5.3 Scope of Work

Operations

- 5.3.1 How many centers do you operate? (List address & number of employees for each location)
- 5.3.2 What languages do you currently support?
- 5.3.3 What awards or recognition has your company received in the past three years?
- 5.3.4 Provide an example of how you have used reporting to positively impact a client's business.
- 5.3.5 What reports form the foundation of your quarterly business reviews? Please provide an example of a QBR template
- 5.3.6 Who on your management team reviews client reports on a regular basis?
- 5.3.7 What is the standard timeframe to transition a new client?
- 5.3.8 What resource requirements would be required from CareOregon's side?
- 5.3.9 Please provide a standard implementation plan.
- 5.3.10 If proposing a hybrid staffing model, describe how calls will be routed to the per minute overflow employees.

Culture/Labor Market

- 5.3.11 What is your mission statement?
- 5.3.12 How does your corporate culture align with your understanding of our own company, values, and culture?
- 5.3.13 Describe your labor market, including post-secondary education rates and unemployment rates.
- 5.3.14 Describe your company's competitive differentiators within your labor market.
- 5.3.15 Outline your attraction and recruitment strategies and processes.
- 5.3.16 How do you typically manage CPI increases for labor markets where you operate?
- 5.3.17 What is the minimum wage in the markets where you operate?

Agent Training/Engagement

- 5.3.18 Describe your training structure (team and facilities) and outline approach to new hire training.
- 5.3.19 What is unique about your agent training regimen?
- 5.3.20 What’s your maximum class training size?
- 5.3.21 What percentage of new hires graduate from training to production?
- 5.3.22 What percentage of agents are still with the company six months after graduating from training?
- 5.3.23 Will CareOregon have a dedicated team?
- 5.3.24 What is your annual agent attrition rate? (list both voluntary and involuntary turnover numbers)
- 5.3.25 Do you have any incentive programs for your agents and staff?
- 5.3.26 Describe your employee engagement strategies and measurement processes.
- 5.3.27 What is your average tenure of salaried staff? Hourly staff?
- 5.3.28 How do you identify new agents?
- 5.3.29 Do you have any guidelines establishing length of tenure before staff can be promoted?

Agent Profile/Team Commitment

- 5.3.30 How do you profile your agents?
- 5.3.31 What skills are vetted prior to hiring? How do you test for skills?
- 5.3.32 What ongoing developmental training do you offer?
- 5.3.33 What percent of agents have some post-secondary education?
- 5.3.34 What percentage of the program manager(s)’s time will be dedicated to our project?
- 5.3.35 Describe your governance model including detail on senior management involvement on our account.
- 5.3.36 Describe policy on gaps in performance and how concerns are managed through resolution.

Technology/Reporting Customization and Client Access

- 5.3.37 What custom reporting capabilities do you have?
- 5.3.38 Is there a client portal for us to easily access reports?
- 5.3.39 Can we access reports in real time or near real time?
- 5.3.40 Provide examples of standard and customer reporting for operational performance.

5.4 Equity, Diversity and Inclusion Efforts

- 5.4.1 Describe your firm’s equity, diversity and inclusion values, policies, efforts and successes. Include specific details of efforts and how they have shaped the composition and spirit of your firm.
- 5.4.2 Supplier diversity is the intentional inclusion of historically underutilized businesses in a firm’s supply base to achieve innovation, cost reduction, and building economic growth in our communities. If you plan to use subcontractors or other third-party services for the services proposed to CareOregon, describe your supplier diversity program.
- 5.4.3 Outline the specific elements of your proposed services that will support and advance CareOregon’s equity, diversity and inclusion mission.

5.5 Fees

Provide a cost proposal for staff augmentation and professional services for the implementation and the ongoing performance of the services.

Provide fees for:

Implementation Fees	Lump sum	\$
Ongoing Administration	Annual fee	\$
Full-Time Employee	Per employee per hour	\$
Per Minute	Per month, plus overage fees	\$

*Note that the above rates should be fully loaded with no other fees or reimbursements.

**Fees will locked for each two year period of the contract.

5.6 References

Provide at least three (3) references from clients your firm has served similar to CareOregon in the past three (3) years, including one client that has newly engaged the firm in the past thirty-six (36) months and one (1) long-term client. Provide the name, address, email, and phone number of the references. Please note the required three references may not be from CareOregon staff, but additional references may be supplied. Points awarded for this criteria are based on both the providing of references as well as information gleaned from the provided contacts. Evaluation Committee members may contact references at their sole discretion.

5.7 Completed Proposal Certification (see the below form)

PROPOSAL CERTIFICATION
RFP #2021-02

Submitted by: _____
(Must be entity's full legal name, and State of Formation)

Each Proposer must read, complete and submit a copy of this Proposal Certification with their Proposal. Failure to do so may result in rejection of the Proposal. By signature on this Proposal Certification, the undersigned certifies that they are authorized to act on behalf of the Proposer and that under penalty of perjury, the undersigned will comply with the following:

SECTION I. NON-DISCRIMINATION: That the Proposer has not and will not discriminate in its employment practices with regard to race, color, creed, age, religious affiliation, sex, marital status, disability, sexual orientation, gender identity, national origin, veteran status, or any other protected class. Nor has Proposer or will Proposer discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran owns or an emerging small business that is certified under ORS 200.055.

SECTION III. CONFLICT OF INTEREST: The undersigned hereby certifies that no officer, agent or employee of CareOregon is personally interested, directly or indirectly, in any resulting contract from this RFP, or the compensation to be paid under such contract, and that no representation, statements (oral or in writing), of the CareOregon, its officers, agents, or employees had induced Proposer to submit this Proposal. In addition, the undersigned hereby certifies that this proposal is made without connection with any person, firm, or corporation submitting a proposal for the same material, and is in all respects fair and without collusion or fraud.

SECTION IV. COMPLIANCE WITH SOLICITATION: The undersigned further agrees and certifies that they:

1. Have read, understand and agree to be bound by and comply with all requirements, instructions, specifications, terms and conditions of the RFP (including any attachments); and
2. Are an authorized representative of the Proposer, that the information provided is true and accurate, and that providing incorrect or incomplete information may be cause for rejection of the Proposal or contract termination; and
3. Will furnish the designated item(s) and/or service(s) in accordance with the RFP and Proposal.

Name: _____ Date: _____
Signature: _____ Title: _____
Email: _____ Telephone: _____
Oregon Business Registry Number: _____ OR CCB # (if applicable): _____

Business Designation (check one):

Corporation Partnership Sole Proprietorship Non-Profit Limited Liability Company

Minority (MBE), Women (WBE), Service Disabled Veteran (SDV), and Emerging Small Business (ESB):

Certified by the State of Oregon (check as applicable):
MBE WBE SDV ESB

Self-identified (check as applicable):
MBE WBE SDV ESB