

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. There is a deadline for submitting questions to KHS about this RFP.
2. There is a deadline for submitting bids to KHS.
3. Every bid package must include:
 - a. Answers to questions in Attachment A
 - b. Answers to questions in Attachment B
 - c. Answers to questions in Attachment C
 - d. Signed copy Attachment D
 - e. Signed copy of Attachment E
 - f. Bidders PSA terms and conditions objections and explanations thereof as an additional Attachment F

KERN HEALTH SYSTEMS

9700 Stockdale Highway

Bakersfield, CA 93311

Request for Proposal

Professional Services Agreement

To

24/7 Nurse Triage & Advice Services

July 15, 2019

Proposals Due:

August 30, 2019 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 Affidavit.
 - 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 661-664-4382, or addressed to:

Kern Health Systems
Attention Purchasing Department
9700 Stockdale Highway
Bakersfield, CA 93311
 - b. Requests for explanation must be submitted by July 26, 2019 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/proposals/>, 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 THREE (3) hard copies of your Proposal and 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, 9700 Stockdale Highway, Bakersfield, CA 93311. Proposals shall be clearly identified by stating, "ATTENTION PURCHASING: 24/7 Nurse Triage & Advice Services 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 August 30, 2019 2:00 PM PST. Late Proposals will NOT be considered or accepted.**
6. Non-Collusion Affidavit

Each Bidder is required to complete the document entitled, "Non-Collusion Affidavit" 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 24/7 Nurse Triage & Advice Services
 - 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
9700 Stockdale Highway
Bakersfield, CA 93311
 - 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 proposer 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

- **July 15, 2019** RFP release
- **July 26, 2019** Bidders Questions Due (2:00PM) Please e-mail.
- **August 2, 2019** KHS will e-mail responses to all Bidders
- **August 30, 2019** Proposals due (2:00PM PST)
- **October 10, 2019** Proposed contract presented to KHS Board for approval
- **October 11, 2019** Award Announcement
- **November 1, 2019** Notwithstanding the approval of the contract by the KHS Governing Board, the contract, its terms and conditions, and the commencement of operations thereunder are subject to regulatory approval and modification.

B. STATEMENT OF PURPOSE

This RFP contains a list of requirements for the development of 24/7 Nurse Triage & Advice Services

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 255,000, 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

DESCRIPTION OF PRODUCTS AND SERVICES REQUIRED

Sections A, B, C & D below outline the Services required. Please respond to the questions in sections E & F.

A. Services Summary

Kern Health Systems (KHS) is required to provide its members with 24/7 nurse triage and Advice, health information, disease and/ or case management both through California licensed nurses and a phone accessible self-help library (AHL), and related services associated with 24/7 nurse triage phone-in service.

Below is a listing of the service expectations:

B. KHS Demographics for 24/7 Nurse Triage Project:

1. Current membership base is 255,000 lives with a potential to grow.
2. All members reside within Kern County, California.
3. Members meeting emergency room (non-911 level emergency) or urgent care level dispositions are to be directed to a contracted facility – KHS would provide a regular feed of contracted facilities.
4. All members will have a medical home – either through a clinic or an assigned PCP.
5. Members will reside in all age groups with the largest percentage being Pediatrics.
6. All members are covered by Medi-Cal, and some have duplicative other health coverage.
7. KHS will provide regular eligibility files to include member's assigned PCP.
8. KHS member usage of Nurse Triage average 1,000-3,000 per month for combined clinical and non clinical services.

C. Vendor Phone Services Structure for incoming calls for members:

1. All call tree option choosing between English, Spanish and Other; KHS can drop members into English/Spanish queues if vendor chooses.
2. Ability to use interpreter services if indicated; i.e. Language line or other
3. Option to use self-health library (AHL).
4. Option to direct member to self-health library when appropriate.
5. Allow for call-back option for members not wanting to hold for a Nurse.
6. Call queue priority based on initial protocol severity.
7. If using a model where caller is presented to a coordinator for capturing member information and primary reason/criticality of the call, this information is passed to the nurse providing triage, and therefore not requiring the nurse to duplicate the initial questions posed to the member.

D. KHS' Responsibilities.

1. Maintain a dedicated toll-free number for routing member calls to the Nurse Triage services.
2. Screen service options to direct only Nurse Triage related calls to vendors call tree.
3. Transmit an eligibility file on a reoccurring basis to be discussed during planning & implementation phase. KHS preference is daily.
4. Transmit a provider directory file linking member to provider on a reoccurring bases.
5. Provide to vendor the protocols for determination of services the member is authorized to receive through the nurse triage services (Business Rule).
6. Monitor services provided by vendor under the contract.
7. Investigate and determine member grievances involving vendor.

E. Vendor Responsibilities

1. Describe your staffing model for 24/7 phone nurse triage services.
2. Note how many California-licensed RN, for nurse level triage, will be dedicated to KHS members?
3. What language support services do you use to address non-English speaking members?
4. Do you have NCQA/URAC accreditation, if so, what is your current accreditation level?
5. Describe how the criticality of the member medical needs is determined.
6. How do you ensure accuracy of eligibility of members?
7. How does your system tie member to provider lookup?
8. Can your system handle providers with rotating office schedules to multiple locations- namely, providers that have routine visits to rural locations?
9. What is your average uptime percentage over the past twelve months?
10. What is your disaster recovery model, how often do you test it?
11. How long do you maintain call logs for client review?
12. What types of reports do you provide on a daily, monthly & quarterly basis?
13. Do you allow ADHOC reporting?
14. What is the method of delivery for your reports?
15. Do you have any vendor affiliations that perform other functions as part of your service, i.e. disease or case management with health coaches? If so, what topics or services are offered?
16. What are the methods of outreach or communication to members used by the health coaches?
17. Do you perform periodic surveys of member satisfaction for the services you provide?
18. Can you Fax to the member's provider an encounter for members seeking Urgent Care or ER services?
19. Do you currently notify a non-eligible member seeking services of his or her financial responsibility of any services rendered?
20. Can you provide an electronic feed of daily encounters?
21. Do you investigate and determine member grievances involving vendor and provide an outcome.

F. Special Needs for the Vendor.

1. During holidays and times of office outages, KHS needs the vendor to provide limited member services – can your organization respond to grievance complaints when prompted by KHS grievance coordinators, and can you provide supporting phone recording if requested?
2. Vendor will train and manage a team of non-clinical staff responsible for completing manual outreach via telephone to pre-identified provider offices. KHS will send a file of providers with contract information and specialty designation. Vendor will complete an appointment availability survey for each provider office.

G. Vendor Reporting Requirements.

1. Provide a daily encounter report.
2. Provide a monthly demographic report noting call volumes, types of call, protocol levels broken out between Adults and Pediatrics.
3. Provide a monthly report (or more frequent as appropriate? Of frequent call abuses and potential PCP access issues.
4. Provide the ability to produce ADHOC reporting as needed in problem research and process improvement.
5. Provide Program Activity including:
 - a. Member Inbound Call reasons
 - b. Referral activity between vendor programs with details
 - c. Volume of Resources referred by vendor
 - d. Redirection Rates-downward and upward
 - e. Operational Performance-average speed to answer, average hold time, call blockage rate, and call abandonment rate
 - f. Day and time of Calls with details
 - g. Count of members with completed calls
 - h. Count of Ineligible members—define process for handling

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.

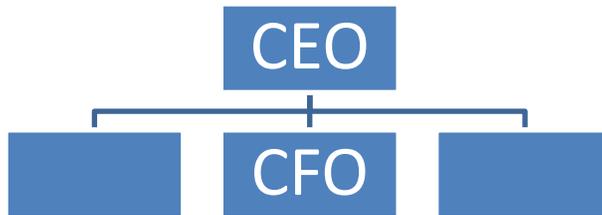
ATTACHMENT C

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:** Bidder’s present financial statements are necessary and must be part of the Proposal submission. 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 August 30, 2019, 2:00 PM PST, at the office of **Kern Health Systems, Attn: Purchasing Dept., 9700 Stockdale Highway, Bakersfield, CA 93311.** 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 AFFIDAVIT

TO BE EXECUTED BY BIDDER
AND SUBMITTED WITH PROPOSAL (Mandatory)

State of California

County of Kern

_____, being first duly sworn, deposes and says that he or she is

_____ of _____ the party making the foregoing proposal that the proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the proposal is genuine and not collusive or sham; that the bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham proposal, and has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham proposal, or that anyone shall refrain from bidding; that the bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the bidder or any other bidder or to fix any overhead, profit, or cost element of the proposal price, or of that of any other bidder, or to secure any advantage against the public body awarding the contract of anyone interested in the proposed contract; that all statements contained in the proposal are true; and, further, that the bidder has not, directly or indirectly, submitted his or her proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization, bid depository, or to any member or agent thereof to effectuate a collusive or sham bid. (Public Contractas Code, section 7106)

Signature

Date