

**Request for Proposals**  
**RFP #20338**  
**Consulting Services for**  
**New York State's Health Insurance Programs and Waiver Initiatives**

**AMENDMENT #1**

**August 31, 2023**

The following are official modifications which are hereby incorporated into Request for Proposals (RFP) #20338: Consulting Services for New York State's Health Insurance Programs and Waiver Initiatives. The information contained in this amendment prevails over the original RFP language.

For all amendments below, deleted language appears in strikethrough ("xxx") and added language appears in red text. Bidders should review all documents in their entirety to ensure all amended language is incorporated into proposals.

**3.1 Minimum Qualifications**

NYSDOH will accept proposals from organizations with the following types and levels of experience as a prime contractor.

**PLEASE NOTE: Minimum qualifications are different for each Component.**

**3.1.1 Component I: Minimum Eligibility Requirements-Financial Advisory and Fee For Service Rate *Development Services***

- A minimum of three (3) years of experience conducting financial audits following the rules of GAAP **and OR** GAGAS;
- A minimum of three (3) years of experience conducting performance audits following the rules of GAAP **and OR** GAGAS;
- A Certified Public Accounting firm that employs at least one (1) Certified Public Accountant(s) licensed in New York; and
- A minimum of three (3) years of experience in providing financial advisory services to a Federal, State, **OR** local government agency.

**3.1.2 Component II: Minimum Eligibility Requirements- *Technical and Data Services***

- A minimum of three (3) projects or initiatives providing:
  - Business **and** Technology Advisory Services; **OR**
  - System Integration Services for enterprise Information Technology system projects with a combined budget of more than \$15,000,000 ~~per initiative~~, within the past ten (10) years.

**3.1.3 Component III: Minimum Eligibility Requirements-1115 Waiver Design and Implementation Advisory**

- A minimum of five (5) years of experience providing advisory consulting services on a Medicaid program to a Federal, State or Local Governmental agency;
- A minimum of three (3) years of experience consulting on projects related to 1115 waivers;

- A minimum of three (3) years of experience working directly with the Centers of Medicaid and Medicare Services (CMS);
  - A minimum of three (3) years' experience convening and leading multistakeholder workgroups; and
  - A minimum of three (3) years of experience ~~with:~~
    - ~~Consulting on and measuring metrics established by the National Committee for Quality Assurance (NCQA) for Clinical and Claims based Quality Measurements;~~ OR
    - ~~Consulting on and measuring metrics established for~~ value-based payment arrangements.
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## 4.2 Staffing

The Contractor(s) shall ensure that there are sufficient staff assigned to the assignment that are experienced and knowledgeable to complete the tasks outlined in the Task Order's specific Scope of Work. The Contractor(s)' staff must be able to meet the responsibilities detailed in the approved Task Order and Scope of work throughout the duration of the approved Task Order.

The following represents the general descriptions for the staffing categories to be utilized by the Contractor when preparing their Scope of work.

- 1 **Qualifications of Engagement Partners:** The Engagement Partners will oversee the Project Managers and will act as the main liaison with the Department's executive staff for each Task Order approved. The Engagement Partners should have at least fifteen (15) years' experience in leading **public health** projects for **private sector clients or** public health governmental agencies ~~within the United States~~.
- 2 **Qualifications of Project Managers:** The Project Managers will coordinate and delegate the assignments to the Contractor's staff, and serve as the main point of contact for the Department regarding new issues, project status, meetings, and all deliverables. The Project Managers should have at least seven (7) years' experience in **public health** projects for **private sector clients or** public health governmental agencies ~~within the United States~~. Additionally, the Project Managers should have a working knowledge of the proposed methodologies, tools and techniques.
- 3 **Qualifications of Senior Analysts:** The Senior Analysts working under the Project Managers will be responsible for performing the more complex analytical work, depending on the project, as well as day- to-day activities. The Senior Analysts will be expected to oversee a functional team and should have at least four (4) years' experience in **public health** projects for **private sector clients or** public health governmental agencies ~~within the United States~~ and should possess such experience in relationship to the scope of work in the requested Task Order. The Senior Analysts should also demonstrate experience in one or more of the following areas: Strategic Planning, Organizational Alignment, Change Management, Training, and Project Management.
- 4 **Qualifications of Associate Analysts:** The Associate Analysts will complete day-to-day project activities under the supervision of the Project Managers and the Senior Analysts. The Associate Analysts should have at least two (2) years' experience in public health

projects for either public or private sector clients and should possess such experience in the scope of work in the requested Task Order.

- 5 **Qualifications of the Analysts:** The Analysts will assist in the completion of day-to-day project Senior Analysts or Associate Analysts. The Analysts should possess experience in the scope of work in the requested Task Order.

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#### 4.6 Security

The selected Contractor shall comply with all privacy and security policies and procedures of the Department (<https://its.ny.gov/eiso/policies/security>) ([nys-p03-002 information security policy.pdf](#)) and applicable State and Federal law and administrative guidance with respect to the performance of the Contract. The Contractor is required, if applicable, to execute a number of security and privacy agreements with the Department including a Business Associate Agreement (Appendix H) and a Data Use Agreement (DUA) at contract signing.

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### 6.0 PROPOSAL CONTENT

The following includes the format and information to be provided by each Bidder. Bidders responding to this RFP must satisfy all requirements stated in the Component(s) of the RFP the Bidder is responding to. All Bidders are requested to submit complete Administrative and Technical Proposals, and are required to submit a complete Cost Proposal. A proposal that is incomplete in any material respect may be rejected.

To expedite review of the proposals, **Bidders are requested to submit proposals in separate Administrative, Technical, and Cost packages inclusive of all materials as summarized in Attachment A, Proposal Documents.** This separation of information will facilitate the review of the material requested. No information beyond that specifically requested is required, and Bidders are requested to keep their submissions to the shortest length consistent with making a complete presentation of qualifications. Evaluations of the Administrative, Technical, and Cost Proposals received in response to this RFP will be conducted separately. Bidders are therefore cautioned not to include any Cost Proposal information in the Technical Proposal documents.

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#### 6.2.4 Technical Proposal Narrative

The Technical Proposal should provide satisfactory evidence of the Bidder's ability to meet, and expressly respond to, each element listed below for the specific Component the Bidder is submitting a proposal for. **A separate Technical Proposal is required for each Component you are submitting a proposal.**

Elements of the Technical Proposal are as follows and may differ based on the Component being bid on:

**D1. Experience – Performing Tasks/ Deliverables** (*Suggested Section Page Limit: Fifteen [15] Pages*)

1. **All Components**: Provide an overview of the Bidder's experience related to the Component's Scope of Work that demonstrates the Firm's capabilities and expertise.
2. **If submitting a proposal to Components I, II, and IV**: Bidders should provide a detailed description of direct experience with three (3) similar engagements within the last five (5) years of actual client projects that demonstrate the depth and breadth of the Proposer's expertise and experience. Please indicate for each of the three (3) client projects the following:
  - Name of client organization;
  - Role of the Bidder;
  - Type of client (e.g., governmental entity, private company, etc.);
  - Project description;
  - Project duration including start/end dates;
  - Number of FTEs involved. ~~;~~ ~~and~~
3. **If submitting a proposal to Components III and V**: Provide two (2) detailed case studies of notable projects handled by the Bidder for a Fortune 100 company **OR** any type of geographic territory (State/Region/County/etc.) with a population of greater than 250,000. The projects selected for the two (2) case studies should be focused on a major health care project. Each case study should be limited to, provide sufficient detail to demonstrate the nature and extent of your Firm's expertise, and include the following