

RFP COHBE-PMO Services-2012-01

Request for Proposals for Program Management Office Services for the Colorado Health Benefit Exchange

RFP BID SIGNATURE SHEET

This page must be submitted with your information.

Original Signature by Authorized Officer/Agent

Vendor Tax ID Number (FEIN)

Type or printed name of person signing

Company Name

Title

Phone Number

Vendor Mailing Address

Fax Number

City, State, Zip

Quote Valid Until

Email Address

Payment Terms (less than Net 30 will not be accepted)

The Colorado Health Benefit Exchange (COHBE) is soliciting proposals to select a Contractor to provide Program Management Office Services to support implementation planning for the Health Benefit Exchange.

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Section 1: Introduction

- 1.1 INQUIRIES:** Unless otherwise noted, prospective Contractors may make written, faxed, or e-mail inquiries concerning this RFP to obtain clarification of requirements. E-mail is the only acceptable method for vendors to submit inquiries. No inquiries will be accepted after the date and time indicated in the Schedule of Activities.

Please e-mail all inquiries to: **info@getcoveredco.org**

We will conduct an optional information session February 6th at 2 pm at the Colorado Health Institute to answer additional questions about this RFP.

303 E. 17th Avenue, Suite 930
Denver, Colorado 80203

This will include a webinar for out-of-state organizations. This information will be provided as an update to the RFP on the website (www.getcoveredco.org).

Clearly identify your inquiries as COHBE-PMO Services-2012-01 in the subject line. Responses to all inquiries will be published on the COHBE website by end of day on January 31st, 2012.

All changes and modifications will be posted on <http://www.getcoveredco.org>. Select the Resources tab and then PMO RFP.

- 1.2 MODIFICATION OR WITHDRAWAL OF PROPOSALS:** Proposals may be modified or withdrawn by Contractors prior to the established due date and time.
- 1.3 PROPOSAL SUBMISSION:** Proposals must be received on or before the date and time indicated in the Schedule of Activities. Late proposals will not be accepted. It is the responsibility of the Contractor to ensure that the proposal is received by the COHBE on or before the proposal opening date and time. Contractors must follow instructions for responding to this RFP outlined in Section 3.0.

Per Section 4.1, Contractors must submit one (1) original hardcopy of the Proposal marked "Original," three (3) additional hardcopies and one (1) electronic format copy on a flash media drive in Adobe Acrobat PDF format. The cost proposal shall be placed in a separate envelop labeled "Cost Proposal for PMO Services." Three (3) hard copies of the cost proposal are requested.

The proposal package shall be delivered or sent by mail to:

Colorado Health Benefit Exchange
Attention: COHBE-PMO Services-2012-01
303 E. 17th Avenue, Suite 930
Denver, Colorado 80203

Contractors mailing their proposals shall allow sufficient mail delivery time to ensure receipt of their proposals by the time specified. The Signature Page must be signed in

ink by the Contractor or an officer of the Contractor legally authorized to bind the Contractor to the proposal.

Proposals which are determined to be at a variance with this requirement may not be accepted. Proposals must be submitted and sealed in a package showing the following information.

Contractor's Name
RFP COHBE-PMO Services-2012-01
Due Date and Time (February 10th at 3 PM MST)

- 1.4 ADDENDUM OR SUPPLEMENT TO REQUEST FOR PROPOSAL:** In the event that it becomes necessary to revise any part of this RFP, an addendum/amendment will be published on the COHBE web site at <http://www.getcoveredco.org>. It is incumbent upon Contractors to carefully and regularly monitor this website for any modifications.
- 1.5 ORAL PRESENTATIONS/SITE VISITS:** Based upon evaluation scoring, selected Contractors will be asked to make oral presentations to the evaluation committee. Such presentations and/or site visits will be at the Contractor's expense.
- 1.6 ACCEPTANCE OF RFP TERMS:** A proposal submitted in response to this RFP shall constitute a binding offer. Acknowledgment of this condition shall be indicated by the autographic signature of the Contractor or an officer of the Contractor legally authorized to execute contractual obligations. It is assumed by the Contractor's response that it acknowledges all terms and conditions of this invitation for an offer. The Contractor shall identify clearly and thoroughly any variations between its proposal and this RFP. Failure to do so shall be deemed a waiver of any rights to subsequently modify the terms of performance, except as outlined or specified in the RFP.
- 1.7 CONFIDENTIAL/PROPRIETARY INFORMATION:** The Colorado Health Benefit Exchange is a nonprofit, unincorporated public entity subject to the Colorado Open Records Act, found at C.R.S. Section 24-72-201 et seq. The Contractor may request restrictions on the public inspection of material contained in the proposal pursuant to C.R.S. Section 24-72-204(3)(a)(IV) in a letter included with the proposal, subject to the following conditions:
- Confidential/proprietary information must be readily identified, marked and separated/packaged from the rest of the proposal.
 - Co-mingling of confidential/proprietary and other information is NOT acceptable. Neither a proposal, in its entirety, nor proposal price information will be considered confidential and proprietary.
 - Any information that will be included in any resulting contract cannot be considered confidential.

The Colorado Health Benefit Exchange will maintain the confidentiality of all proposals during the evaluation and award process. Proposals may be inspected, subject to confidentiality restrictions, after the award has been made.

- 1.8 RFP RESPONSE MATERIAL OWNERSHIP:** All material submitted regarding this RFP becomes the property of the Colorado Health Benefit Exchange. Proposals may be

reviewed by any person after the "Notice of Intent to Make an Award" letter has been issued, subject to the terms of C.R.S. Title 24, Article 72, Part 2 as amended.

1.9 PROPOSAL PRICES: Estimated proposal prices are not acceptable. Best and final offers may be considered in determining the apparent successful Contractor. Proposals shall be firm for a period of not less than one hundred eighty (180) calendar days.

1.10 EVALUATION: The evaluation will identify the proposals that most effectively meet the requirements of this RFP. The work will be offered to the Contractor whose proposal, conforming to the RFP, will be most advantageous to COHBE, price and other factors considered.

COHBE will conduct a comprehensive, fair and impartial evaluation of each proposal received. COHBE will be responsible for ensuring that:

- The Contractor's proposal complied with the due date and time.
- The Contractor's "Colorado Request for Proposal Signature Page" meets content and other requirements.
- The Contractor included the appropriate number of proposal copies.

The Evaluation process is outlined in Section 4.0

1.11 PROPOSAL SELECTION: Upon review and approval of the evaluation committee's recommendation for award, COHBE will issue a "Notice of Intent to Make an Award" to the selected Contractor. An update on the COHBE website will announce the selected Contractor. Email notices will be sent to all Contractors indicating the notice of intent has been posted. A contract must be completed and signed by all parties concerned on or before the date indicated in the Schedule of Activities.

1.12 AWARD OF CONTRACT: The award will be made to the Contractor whose proposal, conforming to the RFP, will be the most advantageous to the COHBE, price and other factors considered.

1.13 PROPOSAL CONTENT ACCEPTANCE: The contents of the proposal (including persons specified to implement the project) of the successful Contractor will become contractual obligations if acquisition action ensues. Failure of the successful Contractor to accept these obligations in a contract, purchase document, delivery order or similar acquisition instrument may result in cancellation of the award and such Contractor may be removed from future solicitations.

1.14 RFP CANCELLATION: COHBE reserves the right to cancel this Request for Proposal at any time, without penalty.

1.15 COHBE OWNERSHIP OF CONTRACT PRODUCTS/SERVICES:

1. Proposals upon established opening time become the property of COHBE. All products/services produced in response to the contract resulting from this RFP will be the sole property of the COHBE, unless otherwise noted in the RFP. The contents of the successful Contractor's proposal will become contractual obligations.

2. COHBE has the right to retain the original proposal and other RFP response materials for our files. As such, COHBE may retain or dispose of all copies as is lawfully deemed appropriate. Proposal materials may be reviewed by any person after the "Notice of Intent to Make an Award" emails(s) has/have been issued, subject to the terms of Section 24-72-201 et seq., C.R.S., as amended, Public (open) Records. COHBE has the right to use any or all information/material presented in reply to the RFP, subject to limitations outlined in the clause, Proprietary/Confidential Information. Contractor expressly agrees that COHBE may use the materials for all lawful purposes, including the right to reproduce copies of the material submitted for purposes of evaluation, and to make the information available to the public in accordance with the provisions of the Public Records Act.
3. In addition, since this contract is federally funded, there are stipulations regarding record-keeping.

1.16 INCURRING COSTS: COHBE is not liable for any cost incurred by Contractors prior to issuance of a legally executed contract or procurement document. No property interest, of any nature shall occur until a contract is awarded and signed by all concerned parties.

1.17 PROPOSAL REJECTION: COHBE reserves the right to reject any or all proposals and to waive informalities and minor irregularities in proposals received and to accept any portion of a proposal or all items proposed if deemed in the best interest of COHBE.

1.18 VENDOR IDENTIFICATION: The tax identification number provided must be that of the Contractor responding to the RFP. The Contractor must be a legal entity with the legal right to contract.

1.19 NEWS RELEASES: News releases pertaining to this RFP shall NOT be made prior to execution of the contract without prior written approval by COHBE.

1.20 CERTIFICATION OF INDEPENDENT PRICE DETERMINATION

1. By submission of this proposal each Contractor certifies, and in the case of a joint proposal, each party thereto certifies as to its own organization, that in connection with this procurement:
 - (a) The prices in this proposal have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other Contractor or with any competitor;
 - (b) Unless otherwise required by law, the prices which have been quoted in this proposal have not been knowingly disclosed by the Contractor and will not knowingly be disclosed by the Contractor prior to opening, directly or indirectly to any other Contractor or to any competitor; and
 - (c) No attempt has been made or will be made by the Contractor to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.
2. Each person signing the Request for Proposal Signature Page of this proposal certifies that:

- (a) S/he is the person in the Contractor's organization responsible within that organization for the decision as to the prices being offered herein and that s/he has not participated, and will not participate, in any action contrary to (1)(a) through (1)(c) above; or s/he is not the person in the Contractor's organization responsible within that organization for the decision as to the prices being offered herein but that s/he has been authorized in writing to act as agent for the persons responsible for such decision in certifying that such persons have not participated, and will not participate, in any action contrary to (1)(a) through (1)(c) above, and as their agent does hereby so certify; and she/he has not participated, and will not participate, in any action contrary to (1)(a) through (1)(c) above.
- 3. A proposal will not be considered for award where (1)(a), (1)(c), or (2) above has been deleted or modified. Where (1)(b) above has been deleted or modified, the proposal will not be considered for award unless the Contractor furnishes with the proposal a signed statement which sets forth in detail the circumstances of the disclosure and the head of the agency, or her/his designee, determines that such disclosure was not made for the purpose of restricting competition.

1.21 IMPLEMENTATION CONFLICTS: As outlined in the Statement of Work in Section 2, the Contractor selected for managing the PMO will be responsible for providing support for implementation of the Exchange. This will include producing RFPs and selecting contracted services for critical implementation activities. Thus, the selected Contractor will be restricted from bidding and competing for the following specific implementation activities:

- 1. Technology Implementation for the Technology or Service Platforms for COHBE. This includes any technology-specific service related to the software development and technology implementation of any component of the Health Benefit Exchange. This includes and is not limited to:
 - a. Technology Architecture
 - b. Software / Application Development
 - c. Quality Assurance / Application Testing
 - d. Independent Validation and Verification
 - e. Data Architecture
 - f. Data Conversion
 - g. Interface Design and Development
 - h. Hosting and Operational Services (platform and system operations and support)
- 2. Operational Implementation / Back-Office Services. This includes development of systems and capabilities to support COHBE, primarily supporting financial, accounting, and HR process and system implementation. This also includes planning and managing the movement of COHBE to a new operational facility.
- 3. Exchange Operations. This includes direct management of Exchange customer-facing operations, including training, customer support, call center management, and day to day operation of the Exchange.

1.22 STRUCTURE OF THE RFP

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1.23 SCHEDULE OF ACTIVITIES

All times are Mountain Standard Time (MST) and no exceptions will be made for late submissions.

	Activity	Deadline (MST)	
1.	RFP Notice Published	1/23/2012	
2.	Prospective Contractors Written Inquiry Deadline (No Questions Accepted After This Date/Time)	1/27/2012	5:00 PM
3.	Written Answers Provided For All Written Inquiries	1/31/2012 (Published by 5:00 PM)	
4.	RFP Session (Optional). This will be conducted at the Colorado Health Institute. A presentation by COHBE will be provided and vendors will have a chance to ask questions.	2/6/2012	9:00 AM
5.	<u>Proposal Submission Deadline</u> Submit One (1) original hardcopy of the Proposal marked "Original," <u>Three (3) additional hardcopies</u> and <u>one (1)</u> electronic format copy on a flash media drive. Cost proposals shall be delivered in a separately sealed envelope and marked "Cost Proposal for PMO Services." Three (3) hard copies of the cost proposal are requested.	2/10/2012	3:00 PM
6.	Internal Evaluation and Scoring of Proposals. Selection of top three (3) proposals.	2/13/12	2/17/12
7.	Oral Presentations Conducted	2/23/12	2/24/12
8.	Vendor Award Communicated	2/28/12	
9.	Initial Contract Period (Phase 1) Option for 18-month renewal based upon performance.	3/1/2012	9/1/2012

Section 2.0 Statement of Work

2.1 OVERVIEW OF THE COLORADO HEALTH BENEFIT EXCHANGE

Established by Senate Bill 11-200 and passed by the General Assembly in May 2011, the Colorado Health Benefit Exchange (Exchange) is a nonprofit, unincorporated public entity where individuals, families and small employers can shop for and buy health insurance based on quality and price. The Exchange is a public, non-profit organization governed by a Board of Directors with additional direction from a panel of state legislators called the Legislative Implementation Review Committee. The initial planning and creation of the Exchange is funded by federal grants. Customers are expected to begin purchasing health plans through the Exchange in October 2013, with plans taking effect on January 1, 2014. After the first year of operation, the Exchange must be self-financing.

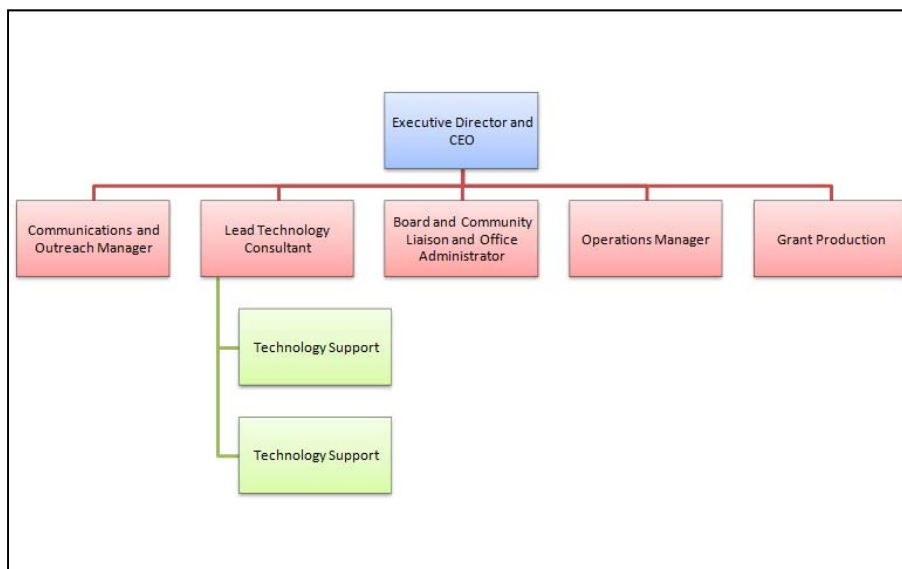
The mission of the Exchange is to increase access, affordability, and choice for individuals and small employers purchasing health insurance in Colorado. By providing easy to understand information about health plans, the Exchange will give Coloradans more control, quality choices and better protections when buying health insurance. The Exchange will include a website, call center and navigators across Colorado to personally assist customers with purchasing health plans. The Exchange will also offer up-front financial assistance to eligible Coloradans to reduce the cost of premiums.

The aggressive implementation schedule, combined with the high degree of complexity of the Exchange, requires a highly effective Program Management Office (PMO) function that can support implementation activities.

2.2 UNDERSTANDING THE EXCHANGE IMPLEMENTATION

2.2.1 EXCHANGE STAFF AND STRUCTURE

COHBE is a relatively new organization. Currently, only the Executive Director is a full-time staff member but this will change as Colorado receives grant funding for implementation. The organization has specific contractors supporting business functions as illustrated by the red boxes below:



The Contractor will be required to work with these current contractors and staff on the implementation of the Exchange. This relationship is outlined in more detail in Section 2.7 below. COHBE is seeking a highly collaborative approach that maximizes existing human capital and supplements functional and operational gaps.

2.2.2 EXCHANGE IMPLEMENTATION AND PMO SCOPE OF IMPLEMENTATION

There are currently four primary operational areas for COHBE implementation as outlined below; the role of the PMO in relationship to these areas is as follows:

Operational Area	Functions	PMO Scope of Responsibility
Exchange Operational and Organizational Implementation	<ul style="list-style-type: none"> Plan and build the organization to operate the Exchange. Includes staffing, facility management, back-office processes and support systems (accounting, human resources). 	<ul style="list-style-type: none"> Minimal function The PMO will provide some basic input into this area but COHBE leadership will be primarily responsible.
Exchange Services and Technology Platform Implementation	<ul style="list-style-type: none"> Manage the selection processes of the technology solution providers. Includes requirements definition, system development, vendor evaluation and selection, operations and maintenance, and performance management. 	<ul style="list-style-type: none"> Primary function The PMO will provide robust, efficient, and effective processes to ensure high-quality implementation. This includes: <ul style="list-style-type: none"> Strategic Planning Project Planning / Schedule Mgmt Performance Management Risk Management Issue Management Contract Management Cost and Budget Control Management Knowledge and Document Mgmt Quality Assurance Scope Management The PMO will build and manage operational performance metrics and service level agreements. The PMO will manage communication specific to service implementation. The PMO will support federal grant writing processes to ensure sufficient funding for the Exchange. The PMO will provide risk analysis for key decisions.
Health Care Policy	<ul style="list-style-type: none"> Ensure Exchange compliance to federal and state policy. Implement policy-based business requirements for both private and public (Medicaid/CHP+). Manage both healthcare provider relationships. 	<ul style="list-style-type: none"> Support function The PMO will support risk analysis for key policy decisions. The PMO may provide input and analysis of federal and state policies. The PMO will provide infrastructure to support the governance of policy decisions. <ul style="list-style-type: none"> Schedule Management (Timelines for key decisions) Issue and Risk Management Knowledge Management

Operational Area	Functions	PMO Scope of Responsibility
Marketing and Outreach	<ul style="list-style-type: none"> Plan and execute communication strategies to external constituencies. Includes branding and marketing services. Plan and execute strategies for provider and customer outreach. 	<ul style="list-style-type: none"> Support function The PMO will work with COHBE to identify critical stakeholders and build communication plans that leverage multiple channels. The PMO will provide support to ensure consistent messaging.

2.2.3 EXCHANGE TIMELINES

The timeline for implementation is very aggressive with an operational target of initial operations starting in October 2013, with plans taking effect on January 1, 2014. The critical and near term objective is the selection of the COHBE Customer Service and Technology Acquisitions. Currently, COHBE is planning on proposals in from vendors by February 27th 2012 with a goal of May 4th, 2012 for contract acceptance. Naturally selection of this vendor will drive key implementation dates.

Other milestones for the Exchange are provided as an attachment to this solicitation.

2.3 PMO CAPABILITY AND OBJECTIVES

In order to support the implementation of the Exchange, the COHBE PMO will be critical in delivering the following capabilities and corresponding objectives. Many of these objectives will be led, facilitated, or supported by the PMO under the direction and management of COHBE leadership. This is clarified in Section 2.5.

Capability	PMO Role	Related Objectives
Program Structure	Facilitate and Lead	<ul style="list-style-type: none"> Working with COHBE leadership, a program model is structured to ensure a culture of high-quality delivery, accountability, collaboration, and transparency.
Strategic (Program) Planning	Facilitate and Lead	<ul style="list-style-type: none"> Development of a clear and realistic Implementation Roadmap for Exchange business operations. Prioritization and sequencing of projects and investments; this includes ensuring budgets, resource plans, and contracts align to the Implementation Roadmap.
Schedule Management	Lead	<ul style="list-style-type: none"> Projects are setup for success and are effectively planned with realistic timelines, dependencies, deliverables, and staffing.
Performance Management	Lead	<ul style="list-style-type: none"> Metrics and service level agreements are established and managed which ensure projects are delivered on time and within budget. Performance issues are effectively identified and resolved.
Risk Management	Lead	<ul style="list-style-type: none"> A highly effective method for identifying and mitigating operational, technical, and financial risks is in place and provides a basis for critical leadership decisions.

Capability	PMO Role	Related Objectives
Communication	Support	<ul style="list-style-type: none"> Communication support to result in highly informed stakeholders across the state. This plan maximizes multiple communication channels and has evaluative mechanisms to improve communication effectiveness.
Organizational Change Management	Facilitate	<ul style="list-style-type: none"> Organizational planning has been successful in building a qualified and scalable infrastructure to support the Exchange.
Contract Management	Lead	<ul style="list-style-type: none"> Processes and policies are in place to define requirements and select qualified contractors and vendors to provide services for the Exchange. Contract standards and processes are in place to ensure high performance from contractors and vendors. Roles and responsibilities for contractual management are clearly defined.
Issue Management	Lead	<ul style="list-style-type: none"> Conflicts and issues are actively identified and tracked through to resolution. Automated workflow for issue identification and tracking are operational.
Cost and Budget Control Management	Support	<ul style="list-style-type: none"> Working with the financial advisors for COHBE, ensuring budgetary controls are compliant with state and federal guidelines and all financial reporting processes are operational.
Knowledge and Document Management	Lead	<ul style="list-style-type: none"> A secure but accessible library of key documents, contracts, deliverables, and other documentation is operational for the Exchange for both internal and external usage.
Quality Assurance	Support	<ul style="list-style-type: none"> Clear quality assurance processes are defined and operational for business and technical operations.
Scope Management	Lead	<ul style="list-style-type: none"> Processes for managing project-level scope of work are operational.

2.4 CONTRACT TIMELINE

This contract will be completed in two distinct phases. Phase 1 will start in March 2012 for a six-month term. Beyond the Phase 1 contract term, based upon vendor performance, the contract (Phase 2) will be extended for up to 18 months. Negotiations will start 30 days prior to Phase 1 completion. COHBE reserves the right to terminate the contract upon completion of Phase 1 and competitively bid the next phase.

The ability to fund Phase 2 activities will be based upon COHBE's ability to secure federal funds.

2.5 FUNCTIONAL ROLE OF THE PROGRAM MANAGEMENT OFFICE (PMO)

As described above, COHBE is a new organization and is seeking the right partnership model in building the Exchange operation. This partnership should be highly productive, evolve as needed, and challenge the organization to improve quality of the operation. As outlined in Section 2.3, this requires a Contractor with broad depth and expertise across multiple disciplines. This section provides more details across these disciplines and functions and outlines specifically what is expected from the PMO Contractor.

2.5.1 PMO GOVERNANCE STRUCTURE

Given the “start up” environment, implementing a highly complex PMO with governance processes will likely not be optimal. How the PMO interacts with COHBE staff and contractors – including their reporting structure and roles is one of the first critical activities the PMO. The Contractor will be responsible for developing an approach to implement this PMO. The Contractor must outline this approach in their proposal but it is optional to define the future organizational state structure of the RFP.

2.5.2 STRATEGIC PLANNING / IMPLEMENTATION ROADMAP

One of the first tasks for the Contractor will be updating and building a 2 year Implementation Roadmap which will identify critical Exchange projects and the associated duration for each project. This Roadmap will also identify dependencies, ownership for each project, and expected outcomes for each project. A current version of the roadmap is included in Appendix A. The Contractor will be responsible for facilitating the COHBE staff in the development of this Implementation Roadmap and as well as maintaining updated versions.

2.5.3 OPERATIONAL SUPPORT

The following table outlines traditional PMO functions that the Contractor must provide for this engagement.

Function	PMO Responsibility
Schedule Management	<ul style="list-style-type: none"> The Contractor will build and/or review (as necessary) operational project plans and corresponding schedules. The Contractor will be responsible for methods that review and ensure plans are realistic for implementation. This includes managing version controls of plans, establishing schedule metrics, identifying dependencies, and ensuring contracts are aligned to the schedule. The PMO will work with contractors and staff to ensure plans are current and managed effectively. The PMO will manage resources and staff; including maintaining a master calendar of key events. The PMO will provide software tools for managing schedules and plans.
Performance Management	<ul style="list-style-type: none"> The PMO will work with COHBE leadership to establish operational metrics for delivery of the Exchange. While activities may be delivered by other contractors and staff, the PMO will be charged with evaluating and measuring performance and ensuring actions are taken to mitigate poor performance. The PMO will ensure contracts include proper service level agreements and other performance-based metrics to maximize contractor performance.
Risk Management	<ul style="list-style-type: none"> The PMO will be responsible for establishing a risk management process. The PMO will be responsible for cataloging key risks for the program; including development of mitigation strategies for each risk. The PMO will perform risk analysis functions as necessary to support critical operational decision making. The PMO will provide necessary tools (software) to manage risk as appropriate.

Function	PMO Responsibility
Communication	<ul style="list-style-type: none"> • The PMO will work with COHBE staff to build a communication plan that catalogs stakeholders and outlines effective communication mechanisms and channels for communication. • The PMO will provide messaging services and support the development of presentations and other material as needed by COHBE staff. • The PMO will provide communication tools to conduct surveys, virtual meetings, and conference calls as necessary. • The PMO will facilitate meetings as necessary, including producing agendas and meeting minutes. • The PMO will produce a status reporting mechanism for COHBE leadership.
Issue Management	<ul style="list-style-type: none"> • The PMO will be responsible for establishing an issue management process. • The PMO will be responsible for cataloging key issues for the program; including development of mitigation strategies for each risk. • The PMO will ensure risks are properly managed and resolved. • The PMO will perform analysis functions as necessary to support critical operational decision making and/or issue resolution. • The PMO will provide necessary tools (software) to manage issues as appropriate.
Cost and Budget Control Management	<ul style="list-style-type: none"> • While COHBE will be responsible for financial controls and budgets, the PMO will support this function by tracking project actual data to planned expenditures. • The PMO will help plan budgets for contracted expenditures and will assist in producing budgets for funding grants. • The PMO will ensure weekly tracking of project expenses and will report them to COHBE leadership.
Knowledge and Document Management	<ul style="list-style-type: none"> • The PMO will establish a process for archiving and ensuring version control for all knowledge artifacts. • The PMO will be responsible for all managing enterprise documents (exception will be human resources) by providing an on-line (secure, cloud based repository).
Scope Management	<ul style="list-style-type: none"> • The PMO will ensure robust change management processes for project scope. This includes managing scope within contracted services. • The PMO will establish a formal change control board capacity for the COHBE to facilitate the review and approval of changes that impact timelines, budget, or functionality of the Exchange.

Contractors may add additional processes as necessary but these are considered the basic PMO functions.

2.5.4 ORGANIZATIONAL CHANGE MANAGEMENT

An on-going responsibility for the PMO will be assisting the COHBE leadership team with organizational change management as the operation scales and grows. During this initial contracted phase, the expectation is the Contractor will provide guidance and advice to the COHBE leadership team on effective methods to scale the organization. The PMO Lead should have depth on providing organizational change management support but the Contractor will not be responsible for implementation-focused change

management for the Exchange. This will likely be part of the second phase of PMO contract.

2.5.5 CONTRACT MANAGEMENT

A critical and vital role for the PMO will be to provide contractual management support. In addition to creating RFPs and other requests for contracted services, the PMO will:

- Develop effective evaluation and selection processes
- Develop baseline operational contracts for all contracted services
- Coordinate evaluation and selection processes
- Implement robust contracted service level agreements
- Ensure federal/state compliance with contracts
- Develop processes for reviewing contractor performance

During this first phase, the PMO will act as the primary point of contact in all contractor relationships. There is a strict requirement that the PMO must be completely neutral and agnostic with other software, hardware, and professional services vendors. Contractors must attest to this Statement of Conflict of Interest (Section 3.1.5).

The first major responsibility will be on providing contract management support for the Customer Service and Technology Vendor Platform. This will be a week 1 responsibility for the PMO Contractor. The PMR Contractor may elect to have additional staff for the first month of the engagement to support evaluation, selection, and support of this major contract.

2.5.6 QUALITY ASSURANCE

The PMO will be responsible for deliverable quality assurance. This includes providing editorial and content quality assurance services on the following deliverables:

- Grant proposals (federal, private)
- Functional and technical specifications
- RFPs
- Contracts
- Status reports
- Communication and Outreach Materials
- Internal Deliverables
- Board Presentations

Other deliverables and artifacts may require review – the PMO must a process that improves overall quality of deliverables and materials.

In addition, the PMO will be responsible for providing document version controls and providing an infrastructure for managing documents and deliverables.

2.6 MANDATORY REQUIREMENTS

The following requirements are mandatory for Contractors in providing PMO services. Proposals that do not meet these minimum mandatory requirements will not be evaluated.

1. The Contractor must show demonstrated experience providing similar PMO Services for three (3) private- or public-sector clients. Qualifications should showcase:

- Ability to facilitate and execute a strategic roadmap for a large-scale system implementation.
- Ability to implement and manage effective contract management capabilities through the lifecycle (evaluation, selection, and maintenance).
- Ability to implement an agile governance model that provides efficient yet highly effective controls. Experience must include examples of the following:
 - Performance Management
 - Risk Management
 - Issue Management
 - Cost and Budget Control Management
 - Scope Management

These qualifications must be referenced as COHBE will verify these qualifications.

2. The Contractor must be in operation for a minimum of three (3) years with a demonstrated focus on providing high-quality PMO services.
3. The Contractor must provide a PMO Lead who has experience in operating a PMO for a large-scale system implementation with specific expertise in managing contracted vendors and services. Large-scale is defined as a minimum of \$15M budget. It is expected that the PMO Lead has at least 12 years of experience directly relevant to development and management of a PMO.
4. The Contractor must present at least one qualification in managing a large public sector project or system implementation.
5. The Contractor's PMO Lead must be located full time in Denver, Colorado. COHBE hours of operation are from 8 am to 5pm MST.

2.7 RECOMMENDED REQUIREMENTS

The following requirements are strongly recommended for Contractors in providing PMO services.

1. PMI certification is optional (either with PMP and/or PgMP) and would be considered a valuable differentiator but actual demonstrated experience will be evaluated higher than any certification.
2. Expertise in federal and state healthcare policy is highly desired. The Contractor should be able to provide policy expertise on the Affordable Care Act and other critical policies.
3. Relevant experience in managing the implementation of systems, including healthcare exchanges, enrollment and eligibility systems, MMIS, and other systems is highly desired.
4. The Contractor should have PMO infrastructural solutions for managing core functions. This may include software tools for managing resources, schedules, issues, and risks as well as mechanisms for effective communication. Ideally, the Contractor will not only implement key management processes but also bring technology solutions to enable and automate these processes.

5. The Contractor should have depth in contractual management, including the necessary legal expertise in writing effective contracts.
6. The Contractor should have sufficient experience in communication planning and execution. This includes developing strategies for communicating to a wide range of stakeholders across Colorado.

2.8 TECHNICAL APPROACH

The Contractor will be required to provide a sophisticated level of support and the approach for planning, building and implementing a value-add PMO should be clearly outlined in the response. The following section outlines the basic requirements for implementing the PMO.

2.8.1 PMO IMPLEMENTATION APPROACH

First, it is important to understand that COHBE is not dictating how the PMO should be structured in regards to the organization or how it should be staffed. COHBE is interested in how an effective PMO may be established and staffed and the focus on this process is a critical component of the PMO implementation.

The Contractor should elaborate on how to effectively engage with existing COHBE staff and contractors in building an effective and high-value PMO. The approach should be highly collaborative and should evolve with the development of the Exchange. The approach should outline how key processes and functions, outlined in Section 2.5 should be implemented (and potentially customized) for best results. This includes implementation of potential tools to support these key processes.

2.8.2 COHBE ORGANIZATIONAL CULTURE

A critical aspect of the PMO implementation is in understanding COHBE's organizational culture. In a relatively small organization with aggressive timelines and significant short-term workload, the following cultural elements are important to understand.

- COHBE believes in a highly collaborative team-focused approach. Everyone has value and believes in the mission of the Exchange.
- A focus on continuous evaluation and improvement is critical. Processes and tools must evolve to support the organization's effectiveness. This requires open and honest evaluation of what is working well and what requires improvement.
- Transparency is essential for a high-performing team. Effective mechanisms to share information, issues, and ideas are highly valued.
- The PMO will not just be a management entity but will have to produce tangible work product. This includes strategic roadmaps, project plans and schedules, risk and issue assessments, RFPs, communication artifacts, and other deliverables which are outlined in Section 2.7.4 below.

A successful PMO implementation approach should recognize and, more importantly, include these critical cultural elements.

2.8.3 STAFFING

The Contractor shall provide a team capable of building and managing the PMO functions. In terms of staffing, the only dedicated resource required is the PMO Lead.

This senior resource must have at least 12 years of experience in building and managing effective PMO services. As outlined in the Mandatory Requirements section, this resource must also reside in Denver, Colorado.

The Contractor may provide additional staff members or subcontractors to perform specific functions. It is recommended that the Contractor have access to legal and policy expertise as needed during this engagement as staffing these resources on a full-time basis may not be feasible.

Ideally, all Contracted team personnel reside in Denver or in Colorado, but if this is not the case, the Contractor must identify any staff travel requirements.

2.8.4 KEY DELIVERABLES

The following table outlines the key deliverables that the PMO is expected to provide during Phase 1. Additional deliverables may be included if the Contractor recommends additional deliverables that can provide value for these additional deliverables.

PMO Deliverable	Description
PMO Roles and Responsibilities	<ul style="list-style-type: none"> Roles and responsibilities are finalized and approved by COHBE leadership.
Organization Chart	<ul style="list-style-type: none"> Standard organization chart with defined roles for the organization.
Implementation Road Map	<ul style="list-style-type: none"> Primary strategic plan that outlines high level projects across a two year timeline. Includes duration and dependencies and is used to illustrate how all projects fit together to form the program.
Project Plans and Schedules	<ul style="list-style-type: none"> For individual projects, these are used to identify and track detailed tasks. The plan details interdependencies amongst tasks, key project milestones, estimated time (budget and actual), critical path tasks, and resource accountability and takes into account resource schedules (vacations, holidays, etc).
Status Reports	<ul style="list-style-type: none"> Project status reports summarize key information related to the status and health of the project. Status reporting meetings are held at reasonable intervals (typically weekly).
Cost Controls	<ul style="list-style-type: none"> Process for ensuring budgetary controls for specific for implementation of the Exchange platform and services.
Issue Management Process	<ul style="list-style-type: none"> Issue Management processes support the recording, tracking and resolving issues that are impacting the program. This may include automated workflow tools / software to support the issue management process.
PMO Action Log	<ul style="list-style-type: none"> The PMO Action Log is used to record, track and resolve program action items. Action Items are steps that need to be completed to keep the project on schedule. They are usually assigned to a specific person or group.

PMO Deliverable	Description
Risk Management Process	<ul style="list-style-type: none"> Risk management describes the process of recording, tracking and mitigating project risks and their impact on the project. Risks are defined as uncertain events or conditions that can have a negative or positive effect on the objectives of the project.
Communication Plan	<ul style="list-style-type: none"> The Communication Plan will identify stakeholders and details communication mechanics and channels. The goal of this plan is to share timely information with affected parties and gather their valued input and experience.
Communication Materials	<ul style="list-style-type: none"> Communication materials may include presentations, webinars, meeting meetings, and other communication-based deliverables.
Quality Assurance Plan	<ul style="list-style-type: none"> The Quality Assurance Plan exists detailing the activities the project team will perform to help ensure that quality is built into the review of project deliverables. This includes providing quality assurance of grant applications.
Organizational Change Management Plan	<ul style="list-style-type: none"> The organizational change management plan is used to ensure changes to the organization are well planned, communicated, and executed effectively.
Contract Templates	<ul style="list-style-type: none"> Baseline templates for all external contractors who provide goods and services to COHBE.
Contract Evaluation and Selection Processes	<ul style="list-style-type: none"> Processes for evaluating and selecting contractors who provide goods and services to COHBE.
Knowledge and Document Management System	<ul style="list-style-type: none"> Implementation of a core document management repository solution for program artifacts. Includes processes for version control, data backup, and access controls.
RFPs	<ul style="list-style-type: none"> Support in producing customized RFPs for goods and services.
Performance Management Metrics	<ul style="list-style-type: none"> Development of key PMO metrics to ensure high quality management of the program.

Section 3.0 Contractor Response

The purpose of this RFP is to select a Contractor to provide PMO support services as outlined in Section 2 above. The Contractor shall provide a response that starts with Section 3.1 and ensure complete but concise responses to each area.

3.1 GENERAL INFORMATION AND COMPANY OVERVIEW

The Contractor shall complete the Signature Sheet, which provides necessary company and point of contact information. This must be included with the Contractor response.

3.1.1 COMPANY HISTORY

The Contractor shall provide the number of years established and a short history of business offerings specific to providing PMO services. Contractors should provide:

- Description of projects that included PMO services.
- Scope and nature of the PMO projects.
- Size of project and timeframe.
- Nature of PMO services provided.
- Measures of project success.
- PMO's contribution to the success.

3.1.2 Organizational Structure

The Contractor shall provide a summary of their organizational structure. This should include the total number of employees as well as the number and geographic location of offices.

3.1.3 Failure to Complete

The Contractor (or any general partner or joint venture of the Contractor) shall identify if they have ever failed to complete a similar project. If so, list the date of commencement of the project and the entity for which the project was to be performed, and explain why the project was not completed.

3.1.4 Neutrality

The Contractor shall attest to being neutral in software, hardware and other consulting relationships. Specifically, as the PMO will be managing contracts, the Contractor is attesting they are not a reseller of another contractor's services and do currently or have plans to receive financial compensation from other contractors.

3.1.5 Conflict of Interest

The Contractor shall document any conflict(s) of interest due to any other clients, contracts, or property interest. Contractor shall complete the Conflict of Interest Attestation (Section 3.1.5) and include this with their response.

3.1.6 Disclosure of Outstanding Litigation

Explain in detail whether the Contractor's company is currently part of or has ever been part of any litigation related to performing professional services.

3.1.7 Financial Stability

Contractors should provide the latest available audited financial statements to demonstrate financial stability. A statement about the financial viability is sufficient within the response with financial statements attached as an appendix. COHBE will consider financial statements as confidential information and will not share this information with any external party.

3.1.8 SUBCONTRACTORS

The Contractor shall identify if any subcontractors or partners are under contract to support this engagement.

3.2 MANDATORY QUALIFICATIONS

As described in section 2.6, COHBE requires the Contractor to have superior capability and experience in providing PMO services for a similar-sized public sector engagement. The Contractor **MUST** provide qualifications that clearly meet the requirements below:

3.2.1 Business Qualifications. Please provide (3) specific client qualifications in the past 5 years that showcase the Contractor's ability in providing similar PMO Services for three (3) private or public-sector clients. Qualifications should showcase:

- Ability to facilitate and execute a strategic roadmap for a large-scale system implementation.
- Ability to implement, and manage effective contract management capabilities through the lifecycle (evaluation, selection, and maintenance).
- Ability to implement an agile governance model that provides efficient yet highly effective controls.

These qualifications should be organized by a description of the client or scenario, an outline of the approach taken by the Contractor, and the results achieved. These should be concise (maximum of 2 pages for each qualification) and should provide the following essential information:

3.2.2 Operational Stability. The Contractor must be in operation for a minimum of five (5) years with a clear focus on providing PMO services.

3.2.3 Qualified Lead. The Contractor must provide a PMO Lead who has experience in operating a PMO for a large-scale system implementation with specific expertise in managing contracted vendors and services. Large-scale is defined as a minimum of \$15M budget. The Contractor may provide a short bio for the lead and should include a full résumé as an attachment in the appendix.

3.2.4 System Implementation Qualification. The Contractor must have at least one qualification in managing a large public sector project or system implementation. The Contractor may substitute a qualification from 3.2.1 but this qualification should focus on system oversight and governance.

3.2.5 Locally Based Lead. The Contractor's PMO Lead must be located full time in Denver, Colorado. The Contractor shall attest to this agreement.

3.3 QUALIFIED REFERENCES

The Contractor shall provide references for each qualification requested in Section 3.2 and may also elect to provide up to three additional references from current and/or past customers for the last three years, of comparable size and scope, who can attest to the Contractor's experience and qualifications as it relates to the scope of the work described above. Each reference must include the following information:

1. Client Name
2. Project Name
3. Contact Name
4. Contact Title
5. Contact Phone Number and E-mail Address

COHBE reserves the right to independently identify and contact other references in addition to those listed above.

3.4 PREFERRED QUALIFICATIONS

As described in section 2.7, COHBE recommends the Contractor to have additional and unique capabilities in providing PMO services. The Contractor should provide qualifications that clearly meet the requirements below:

- 3.4.1 Certification.** PMI (either with PMP and/or PgMP) or other project management certification is optional and would be considered a valuable differentiator but actual demonstrated experience will be evaluated higher than any certification.
- 3.4.2 Policy Depth and Expertise.** Expertise in federal and state healthcare policy is highly desired. The Contractor should be able to provide policy expertise on ACA and other critical policies. It is acceptable for the Contractor to subcontract this policy expertise as necessary.
- 3.4.3 Health and Human Services System Implementation Experience.** The Contractor should ideally have relevant experience in managing the implementation of systems, including healthcare exchanges, enrollment and eligibility systems, MMIS, and other systems is highly desired.
- 3.4.4 Tools.** The Contractor should have PMO infrastructural solutions for managing core functions. This may include software tools for managing resources, schedules, issues, and risks as well as mechanisms for effective communication. Ideally, the Contractor will not only implement key management processes but also bring technology solutions to enable and automate these processes.
- 3.4.5 Contract Management.** The Contractor should have depth in contractual management, including the necessary legal expertise in writing effective contracts.
- 3.4.6 Communication and Outreach.** The Contractor should have sufficient experience in communication planning and execution. This includes supporting

the development of strategies for communicating to a wide range of stakeholders across the state.

3.5 PMO IMPLEMENTATION APPROACH

3.5.1 TECHNICAL NARRATIVE

This narrative should provide the story for building and managing an effective PMO. It should include a schedule of key activities and a description of deliverables. This should clearly outline how requirements and functions in Section 2.5 will be delivered. The Contractor shall provide a project plan in MS Project, Excel or other scheduling management tool that illustrates the overall work plan for planning, building, and operating the PMO.

The Contractor shall provide a technical approach for how the PMO Services will be implemented and operated. The Contractor shall provide a detailed plan for the first six months of the engagement on how key processes and activities will be developed and implemented. The Contractor should address the following key questions in their response.

- How can an Implementation Roadmap be created and maintained?
- How will the work be done in a collaborative fashion with other staff and contractors?
- How will COHBE leadership be informed and engaged?
- What PMO processes and activities will be a high priority?
- What is the overall schedule for implementation?
- How will evaluation to drive continuous improvement in the processes be used?
- How will the PMO engage in identification and selection of new contracted service providers?

3.5.2 CRITICAL DELIVERABLES

The Contractor shall provide a table response to Section 2.7.5 specifically describing how and when key deliverables are produced within the approach. In addition to the expected deliverables outlined in this RFP; the Contractor should identify additional deliverables that may be useful in the implementation of the Exchange. The Contractor shall identify the process for the review and approval of deliverables.

3.5.3 PROJECT SCHEDULE

This narrative should provide the story for building and managing an effective PMO. It should include a schedule of key activities and milestones (deliverables from Section 3.4.2). The Contractor shall provide a project plan in MS Project, Excel or other scheduling management tool that illustrates the overall work plan for planning, building, and operating the PMO.

3.5.4 PROPOSED STAFFING

The Contractor shall provide the following in terms of staffing:

Contractor Team: The Contractor shall itemize all consultants and subcontractors to be used by the Contractor on this project. Contractors must

provide a PMO Lead resource and may determine how to best staff their team with other resources as necessary.

Briefly outline the responsibilities for each of these resources. Consultant or subcontractor biographies which should provide the following:

- a. Name
- b. Title
- c. Project Role
- d. Location of Resources
- e. Percentage of time dedicated to the project
- f. Brief Summary of work experience and/or qualifications
- g. Résumés should be provided as an appendix for all proposed staff.

Involvement of COHBE Staff: The Contractors shall identify how they plan to interact with and COHBE staff.

3.6 FACILITY AND OTHER REQUIREMENTS

Contractors shall provide a clear description of any facility, personnel, and other requirements need for the accomplishment of the project that COHBE will be expected to provide.

COHBE reserves the right to provide only those facilities, personnel, and other requirements, as COHBE deems necessary and appropriate.

3.7 WORKING ASSUMPTIONS

The Contractor shall identify and list specific working assumptions used in the approach, cost and project schedule.

3.8 COST

The Contractor shall provide a detailed cost proposal including fees and expenses for the initial six month phase of work through September 2012. Contractors shall provide an hourly cost breakdown for each resource and an associated rate.

The cost proposals shall be delivered separately as outlined in Section 4.1.

Section 4.0 Evaluation Criteria and Selection Process

This section specifies how the RFP will be evaluated and awarded.

4.1 SUBMISSION AND GENERAL INSTRUCTIONS

Proposals must be received on or before the date and time indicated in the Schedule of Activities. It is the responsibility of the Contractor to ensure that the proposal is received on or before the proposal opening date and time, regardless of the delivery method used.

Section 3.0 shall be considered the response starting point and Contractors shall have their responses numbered starting at **Section 3.1**.

COHBE emphasizes Contractors to respond with their best proposal for this RFP. If there are requirements which seem unreasonable or if better concepts or practices are available to COHBE, the Contractor should provide them.

Submit one (1) original hardcopy of the Proposal marked "Original," three (3) additional hardcopies and one (1) electronic format copy on a flash media drive in Adobe Acrobat PDF format. Cost proposals shall be placed in a separate envelope and labeled "Cost Proposal for PMO Services." Three (3) hard copies of the cost proposal are requested.

The proposal package shall be delivered or sent by mail to:

Colorado Health Benefit Exchange
Attention: RFP COHBE-PMO Services-2012-01
303 E. 17th Avenue, Suite 930
Denver, Colorado 80203

Email any inquiries to: info@getcoveredco.org

The proposal must be signed in ink by an officer of the Contractor who is legally authorized to bind the Contractor to the proposal. Proposals, which are determined to be at a variance with this requirement, may not be accepted. A proposal signature page has been provided on the BIDS Solicitation Page. Proposals must be submitted and sealed in a package with an appropriate label affixed. The label must show the following information:

Contractor's Name
RFP COHBE-PMO Services-2012-01
Proposal due Date and Time: February 10th, 2012 at 3 pm.

COHBE desires and encourages that proposals be submitted on recycled paper, printed on both sides. While the appearance of proposals and professional presentation is important, the use of non-recyclable or non-recycled glossy paper, as well as the use of unnecessarily elaborate proposals, is discouraged.

4.2 EVALUATION AND SELECTION PROCESS

A review committee will evaluate the merits of proposals received in accordance with the evaluation factors stated in this RFP and formulate a recommendation for selection. The selection committee will identify the top three (3) responses and schedule an oral presentation. Based upon the evaluations of both the written proposal and the oral presentations, the selection committee will make a formal award.

Failure of the Contractor to provide all the information requested in this RFP may result in disqualification of the proposal. This responsibility belongs to the Contractor.

The sole objective of the selection committee will be to recommend the Contractor whose proposal is most responsive to the COHBE's needs while charging reasonable transactional fees. The specifications within this RFP represent the minimum performance necessary for response.

4.3 EVALUATION FACTORS

Sections	Evaluation Factor	Scoring Criteria	Weight
3.3 and 3.4	Qualifications and Demonstrated Capabilities	<ul style="list-style-type: none"> • Direct relevance of referenced qualifications • Fulfillment of mandatory requirements • Fulfillment of recommended requirements 	40%
3.5	Technical Approach and PMO Methodology	<ul style="list-style-type: none"> • PMO methodology and approach for implementation • Risk analysis skills • Organizational change management approach • Communication capabilities 	20%
3.5.4	PMO Staffing Qualifications	<ul style="list-style-type: none"> • Capability of dedicated staffing resources • Capability and depth of additional staffing as needed 	20%
3.8	Cost	<ul style="list-style-type: none"> • Reasonable budget for providing services. • This is provided in a separately sealed envelope. 	20%

NOTE: The Evaluation Committee will judge the merit of proposals received in accordance with the criteria described above. The oral presentations will be scored separately. Criteria for the oral presentations will be provided to the top three (3) vendors.