

STATE OF OREGON



COVER PAGE

OREGON HEALTH AUTHORITY

Is issuing this Request For Proposals (RFP) under OregonBuys Bid
Number S-44300-00017084 for

NCQA-CERTIFIED VENDOR TO PRODUCE AND REPORT CERTIFIED HEDIS® AND NON-HEDIS MEASURES

Date of Issue: 09/28/2026

Opening Date and Time: 11/06/2026 @ 12:00 pm PT

Single Point of Contact (SPC): Enrique Rodriguez, Procurement &
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The State of Oregon promotes equal opportunity for all individuals without regard to age, color, disability, marital status, national origin, race, religion or creed, sex or gender, sexual orientation, or veteran status.

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SECTION 1: GENERAL INFORMATION

1.1 INTRODUCTION

The State of Oregon, acting by and through the Oregon Health Authority, (“Agency” or “OHA”), is issuing this Request for Proposal under the provisions of ORS 279B.060 for a NCQA-certified vendor to produce, certify, and report ~30 HEDIS® and 14 non-HEDIS measures for the Oregon Health Plan.

Additional details on the Scope of the goods or services or both are included in the Scope of Work/Specifications section.

Agency anticipates the award of one Contract from this RFP.

The initial term of the Contract is anticipated to be 5 years with options to renew up to a cumulative maximum of 10 years.

1.2 SCHEDULE

The table below represents a tentative schedule of events. All times are listed in Pacific Time. All dates listed are subject to change. N/A denotes that event is not applicable to this RFP.

Event	Date	Time
Pre-Proposal Conference	October 8, 2026	1:00 PM
Questions / Requests for Clarification Due	October 16, 2026	5:00 PM
Answers to Questions / Requests for Clarification Issued (approx.)	October 21, 2026	
RFP Protest Period Ends	7 calendar days prior to RFP Opening	
Opening (Proposal Due)	See RFP cover page	
Opening of Proposal	Same as Cover Page	
Presentations, Demonstrations, or Interviews	TBD	
Issuance of Notice of Intent to Award (approx.)	December 18, 2026	
Award Protest Period Ends	7 calendar days after Notice of Intent to Award	

1.3 SINGLE POINT OF CONTACT (SPC)

The SPC for this RFP is identified on the Cover Page, along with the SPC's contact information. Proposer shall direct all communications related to any provision of the RFP only to the SPC, whether about the technical requirements of the RFP, contractual requirements, the RFP process, or any other provision.

SECTION 2: AUTHORITY, OVERVIEW, AND SCOPE

2.1 AUTHORITY AND METHOD

Agency is issuing this RFP under the authority of the Department of Administrative Services (DAS) delegation REQ-1000-00020921 (as amended).

Agency is using the Competitive Sealed Proposal method, pursuant to ORS 279B.060 and OAR 125-247-0260. Agency may use a combination of the methods for Competitive Sealed Proposals, including optional procedures: a) Competitive Range; b) Discussions and Revised Proposals; c) Revised Rounds of Negotiations; d) Negotiations; e) Best and Final Offers; and f) Multistep Sealed Proposals.

2.2 DEFINITION OF TERMS

For the purposes of this RFP, capitalized words are defined in OAR 125-246-0110 or as defined below.

- Terminology specific to the OregonBuys system may be found at: [OregonBuys](#)
- HEDIS® means Healthcare Effectiveness Data and Information Set
- NCQA means National Committee for Quality Assurance
- CCO means Coordinated Care Organization
- CMS means Centers for Medicare & Medicaid Services
- Homegrown Measures means OHA-developed, non-standardized measures
- Hybrid Measures means Measures using both administrative data and medical record review
- A "measure" means a standardized health care quality calculation that evaluates access to or quality of care delivered by a provider or organization.
- HEDIS® measures means a subset of health care quality measures developed, stewarded, and copyrighted by the National Committee for Quality Assurance (NCQA).

2.3 OVERVIEW AND PURPOSE

2.3.1 Agency Overview and Background

OHA is the state agency responsible for improving the lifelong health of Oregonians. Within OHA, the Health Policy & Analytics Division (HPA) leads efforts

to transform the health system through data-driven policy, performance measurement, and evaluation.

HPA's Quality Measurement, Surveys, and Reporting (QMSR) team oversees the development, certification, and reporting of health care quality measures for the Oregon Health Plan (OHP), Oregon's Medicaid program. These measures support accountability for Coordinated Care Organizations (CCOs) and inform both state and federal stakeholders, including the Centers for Medicare & Medicaid Services (CMS).

2.3.2 Project Overview and Background

To meet evolving federal and state requirements, OHA must produce certified, accurate, and timely health care quality measures, including HEDIS® and homegrown (OHA-developed) metrics.

With NCQA certification now required for HEDIS® measure production, OHA is seeking to contract with a certified vendor to ensure compliance, improve efficiency, and expand reporting capabilities. This transition will allow OHA to focus on higher-value activities while maintaining high standards for data quality, security, and reporting.

Agency is committed to providing equitable access to information and services, and effective communications that are culturally and linguistically appropriate and accessible for a wide spectrum of people who have different communications needs or abilities. To this end, the successful Proposer shall deliver services that meet standards for digital accessibility established in ODHS/OHA Operational Policy [ODHSOHA 010-030](#) (Digital Accessibility in Hardware, Software and Systems) and [ODHSOHA 010-029](#) (Digital Accessibility in Content Creation and Sharing). The Solution and each Deliverable must meet all applicable standards for digital accessibility. Applicable standards are those set-in law, administrative rule, and the ODHS/OHA operational policies, including as those laws, administrative rules, and policies are updated from time to time.

2.3.3 Purpose

The purpose of this RFP is to secure a qualified, NCQA-certified HEDIS® measurement vendor to support the production, certification, and reporting of approximately 30 HEDIS® and 14 non-HEDIS measures for the Oregon Health Plan. We intend to award one contract to a single vendor. That vendor will be responsible for producing all 44 measures described in the RFP.

This contract will:

- Ensure compliance with NCQA, HIPAA, and State of Oregon data security standards;

- Reduce internal workload and improve operational efficiency;
- Enhance the quality and consistency of Medicaid performance reporting;
- Support data-driven decision-making and health system transformation.

The contract will be structured around deliverable-based payments and support repetitive annual reporting cycles. No exclusions from competition apply under ORS 279B.210 or OAR 125-247-0690(2). While budget details are not disclosed, cost-effectiveness will be a key evaluation factor.

2.4 SCOPE OF WORK/SPECIFICATIONS

The selected vendor will provide technology-enabled services to support OHP's quality measurement program. This includes the certified production, validation, and reporting of approximately 30 HEDIS® and 14 non-HEDIS measures. The vendor will be responsible for maintaining NCQA certification and HIPAA compliance, integrating with OHA's Health Analytics Library (HAL), and delivering quarterly and annual reports to OHA, CCOs, and CMS.

WCAG Compliance. Agency has adopted standards for digital accessibility in operational policies: ODHS/OHA Operational Policy [ODHSOHA 010-030](#) (Digital Accessibility in Hardware, Software and Systems), and [ODHSOHA 010-029](#) (Digital Accessibility in Content Creation and Sharing). The successful Proposer shall ensure the proposed Solution and each Deliverable meets all applicable standards for digital accessibility at the time of submission to Agency for review and any testing.

2.4.1 Technical Specifications

The vendor must provide a secure, scalable, and compliant solution that includes:

- Data Integration: Ability to ingest and process structured data from OHA sources, including claims and enrollment data;
- Certified Measure Calculation: Tools and systems capable of producing NCQA-certified HEDIS® and validated non-HEDIS results;
- Reporting Capabilities: Generate and deliver reports in formats required by OHA, CCOs, and CMS;
- Security Compliance: Adhere to HIPAA and State of Oregon data security protocols, including secure file exchange, audit trails, and version control;
- Project Management Support: Provide planning, communication, and documentation tools to support contract execution and oversight.

2.4.2 Tasks and Responsibilities

Objective A: HEDIS® Certified Measure Production

- Submit a Project Management Plan (PMP) within 20 business days of contract execution;
- Ingest claims, enrollment, and other OHA data; verify that the ingested data aligns with OHA's source data;
- Perform initial and quarterly HEDIS® measure calculations;
- Conduct quality control reviews and remediate errors;
- Submit quarterly HEDIS® reports to OHA and CCOs
- Submit annual reports to CMS.

Objective B: Non-HEDIS Measure Production

- Collaborate with OHA to define and document logic for 14 non-HEDIS measures;
- Produce draft calculations and compare with OHA's internal benchmarks;
- Achieve a minimum 97% quality match before transitioning to vendor-led reporting;
- Submit quarterly non-HEDIS reports to OHA and CCOs;
- Submit annual reports to CMS.

Objective X: Certification and Compliance Maintenance

- Provide annual proof of NCQA certification and HIPAA compliance;
- Ensure continuous adherence to certification and security requirements.

2.4.3 Deliverables

Objective	Deliverables
A – HEDIS®	Project Management Plan, Communication Plan, Data Ingestion Reports, Final Measure Calculation Results with QC Checklists, Quarterly HEDIS® Reports, Annual CMS Report
B – Non-HEDIS	Draft Measure Inventory, Draft and Final Non-HEDIS Results, Quality Control Summary (≥97% match), Quarterly Non-HEDIS Reports, Annual CMS Report
X – Compliance	Annual NCQA Certification Proof, Annual HIPAA Compliance Attestation

2.4.4 Acceptance Criteria

- Deliverables must be submitted electronically to the OHA Contract Administrator.
- All submissions must include required documentation (e.g., ingestion proof, QC checklists).
- Deliverables must comply with NCQA certification standards and OHA formatting requirements.
- OHA will conduct a **pass/fail review** for each deliverable. Payment is contingent on formal acceptance.

2.4.5 Payment and Performance

- Payments will be **deliverable-based** and authorized only upon OHA’s formal acceptance.

Objective	Frequency / Timing
Objective A – HEDIS® Certified Measure Production	PMP due within 20 business days; initial results within 6 months; quarterly reports due by the last business day of the month following each reporting quarter
Objective B – Non-HEDIS Measure Production	Initial results due within 12 months; quarterly reports due by the last business day of the month following each reporting quarter
Objective X – Certification & Compliance Maintenance	Prior to contract execution; annually thereafter

SECTION 3: PROCUREMENT REQUIREMENTS

3.1 MINIMUM QUALIFICATIONS

To be considered for evaluation, Proposal must demonstrate how Proposer meets all requirements of this section:

3.1.1 Certification Requirements – need to be HEDIS certified by NCQA (with the prioritized backlog for specifics)

3.2 MINIMUM SUBMISSION REQUIREMENTS

3.2.1 Proposal Submissions

To be considered for evaluation, Proposal must contain each of the following elements (further detailed in Proposal Requirements section below):

- Proposer Information and Certification Sheet (Attachment C)
- Executive Summary
- Proposer's Organization Profile
- Experience and Capabilities
- Reference Check Forms (Attachment D)
- Key Persons, Organizational Chart, Subcontractors, and Resumes
- Solution Security Requirements (Attachment J)
- Solution Work Requirements (Attachment H)
- Security Statement
- Service Level Agreements (SLAs) (Attachment I)
- Price Proposal Form (Attachment E) (submitted simultaneously but as a separate electronic response file)
- Underlying Agreements
- Disclosure Exemption Affidavit (Attachment B) – submit 1 copy only
- COBID Certification / Outreach Plan (Attachment F)
- Responsibility Inquiry (Attachment G)
- Digital Accessibility Narrative (Attachment K)

3.2.2 Proposal Format and Quantity

Proposal should follow the format and reference the sections listed in the Proposal Requirements section. Responses to each section and subsection should be labeled to indicate the item being addressed.

OregonBuys Electronic Response. Proposer must submit its Proposal electronically through OregonBuys. Proposer should follow the procedures outlined in Section 4.6 for electronic submission.

Proposer shall submit one copy of its Proposal and all other submittal requirements, with Attachment C, Proposer Information and Certification Sheet bearing the Proposer's authorized representative's Signature, in one of the following formats: Adobe Acrobat (pdf), Microsoft Word (docx), or Microsoft Excel (xlsx). If Proposer believes any of its Proposal is exempt from disclosure under Oregon Public Records Law (ORS 192.311 through 192.478), Proposer shall complete and submit the Disclosure Exemption

Affidavit (Attachment B). Proposer shall also mark as “Confidential” in OregonBuys all attachments to its Proposal that Proposer believes are exempt from disclosure.

3.2.3 Authorized Representative

Failure of Proposer’s authorized representative to sign the Proposal may result in rejection of the Proposal by Agency.

3.3 ROUND 1 PROPOSAL REQUIREMENTS

Proposal must address each of the items listed in this section and all other requirements set forth in this RFP. Proposer shall describe the Goods to be provided or the Services to be performed. A Proposal that merely offers to provide the goods or services as stated in this RFP may be considered non-Responsive to this RFP and will not be considered further.

Proposal should not include extensive artwork, unusual printing or other materials not essential to the utility and clarity of the Proposal. Do not include marketing or advertising material in the Proposal, unless requested. Proposal should be straightforward and address the requests of the RFP. Proposal containing unsolicited marketing or advertising material may receive a lower evaluation score if required information is difficult to locate.

3.3.1 Proposer Information and Certification Sheet (Not Scored)

Proposer shall complete and submit the Proposer Information and Certification Sheet (Attachment C).

Failure to demonstrate compliance with Oregon Tax Laws and sign the Proposer Information and Certification Sheet may result in a finding of non-Responsibility.

3.3.2 Executive Summary (Not Scored)

Proposer shall submit a comprehensive, yet succinct Executive Summary, not to exceed three pages, that summarizes the proposed Solution, its distinctive features, and how it will fulfill the State’s requirements. The Executive Summary may also contain a high-level “block” diagram of the proposed Solution in addition to the three pages. Proposer’s response shall delineate any potential single points of failure in the proposed Solution.

3.3.3 Proposer’s Organization Profile (Scored)

Proposer must provide a profile of its organization. This is Proposer’s opportunity to give an overview of its organization, describe the structure of its business, and discuss how the organization can effectively deliver the Services described in this

RFP. The Profile must include:

- Ownership. If incorporated, the state in which the organization is incorporated and the date of the incorporation;
- Location of the organization's offices (headquarters and branches);
- Location of the office from which employees will be assigned to work on the Project for the Agencies;
- Number of employees located in the Pacific Northwest, nationally, and internationally;
- Established business relationships with proposed subcontractors (e.g., data conversion contractor); and
- Organization's client base.

3.3.4 Experience and Capabilities (Scored)

Proposer must demonstrate Proposer has the following experiences and capabilities:

- Proposer must have at least 3 years of experience designing and implementing Cloud-based solutions utilizing an agile methodology.
- Proposer must have at least 3 years of experience working with governmental entities.
- Proposer must be familiar with current Center for Medicare and Medicaid Services rules, policies, and procedures.
- Proposer must have experience with designing and implementing solutions that can easily adapt to and incorporate new rules and standards on a regular basis.
- Proposer must have at least one (1) Solution successfully implemented in the past three (3) years of similar scope and size.

Proposer shall submit work samples for two (2) projects within the last five (5) years that are similar to the scope of this RFP.

3.3.5 References (Not Scored)

Provide three (3) references from current or former client firms for similar projects performed for any clients within the last five (5) years. References must be able to verify the quality of previous, related Work.

Agency may check to determine if references provided support Proposer's ability to comply with the requirements of this RFP. Agency may use references to obtain additional information, or verify any information needed. Agency may contact any

reference (submitted or not) to verify Proposer's qualifications.

Proposer shall send the Reference Check Form (Attachment D) to its references. Reference forms must be completed by the reference, returned to the Proposer and submitted with the Proposal.

3.3.6 Key Persons, Organizational Chart, and Subcontractors (Scored)

Specify key persons to be assigned to this project, and include a current resume (not to exceed two pages each) for each key person that demonstrates the person's qualifications and experience for the Work described in this RFP Solution Requirements

3.3.7 Solution Security Requirements (Scored)

Proposer will submit a narrative describing how the proposed system addresses the high-level requirements set forth in Section 2.4.1. The proposed Solution must fully address the following:

- Solution Requirements, including software, network requirements and capability, selective routing, and databases and database services, security requirements, service levels and service level requirements.

Proposer shall also complete and submit Attachment J, *Solution Security Requirements*. Instructions on how to properly complete this form are contained in an instructions tab on the Attachment J.

3.3.8 Solution Work Requirements (Scored)

Proposer must submit a narrative Scope of Services to encompass the Solution Work Requirements including project timeline, using the information provided in Section 2.4. The proposed Solution must fully address the following:

- Services, including but not limited to: project management, project plan and schedule, data gathering, network design meeting all system requirements, implementation, data migration and training.
- Ongoing Services, including, but not limited to: network management, monitoring, reporting, maintenance and repair, and customer services/help desk.

The Scope of Services may include any additional services or deliverables that Proposer believes are necessary to fully deliver this Solution. Each service or deliverable addressed in the narrative response must be called out by title, and identify the pricing provided for each service or deliverable addressed included in Attachment E.

Proposer must also submit a completed Attachment H, Certification Attestation, indicating Proposer's certification status on each measure included in the

attachment.

3.3.9 Security Statement (Pass/Fail)

Proposer must provide a narrative statement that attests to whether the Proposer currently meets or can in the future meet the following protections:

- Proposer understands and has the capability of handling and protecting Agency Data that has been classified as Level 3 Information under the State of Oregon's Information Asset Classification policy, available online at <https://www.oregon.gov/das/Policies/107-004-050.pdf>.
- Proposer and its employees, contractors, and agents shall comply with all applicable state and federal laws and regulations, and State of Oregon policies governing Agency Data and its use and disclosure, including as those laws, regulations, and policies may be updated from time to time, including:
 - Oregon's Statewide Information Security Standards, found online at: <https://www.oregon.gov/eis/cyber-security-services/Pages/guidance-for-state-agencies.aspx> including security controls that meet or exceed "Moderate" security controls in the National Institute of Standards and Technology (NIST) Special Publication (SP) 800-53.
 - Oregon's Statewide Information Security Plan, found online at: <https://www.oregon.gov/eis/cyber-security-services/Pages/guidance-for-state-agencies.aspx>.
 - Statewide Cloud Computing policy: <http://www.oregon.gov/das/policies/107-004-150.pdf>.
 - Oregon's Statewide Information Technology Policies: www.oregon.gov/das/Pages/policies.aspx#IT.
 - Privileged Access Monitoring and Reporting viewable at: <https://www.oregon.gov/das/Policies/107-004-140.pdf>.

Attachment J, Solution Security Requirements, is provided to Proposers as a reference for what minimum security requirements will be. Proposers are not required to complete the Attachment J spreadsheet in Round 1.

3.3.10 Service Levels (SLAs) (Scored)

Proposer shall submit its service level agreement(s).

3.3.11 Price Proposal (Not Scored in Round 1, Anticipated to be Scored in Round 2)

Proposer shall complete and submit the Price Proposal (Attachment E).

3.3.12 Underlying Agreements (Not Scored)

Proposer will submit any additional documents required for this project (e.g., End User License Agreement (EULA), Maintenance Agreement, etc.).

3.3.13 Value Added Services (Not Scored)

If Proposer is proposing any value-added services, Proposer shall include a statement describing these services. Proposer may submit services including solution engineering, installation, configuration, training and maintenance/support, the corresponding prices, and subcontractors and/or resellers available to provide said services.

3.3.14 Disclosure Exemption Affidavit (Not Scored)

Proposer shall complete and submit the *Disclosure Exemption Affidavit* (Attachment B) as part of the Proposal. **Submission is required even if Proposer is not identifying confidential or proprietary information and data for nondisclosure.** If Proposer is identifying items for nondisclosure as confidential or proprietary, Proposer must specify the reason for the exemption.

Redacted Proposal. If Proposer is identifying items for nondisclosure, Proposer must provide an appropriately redacted copy of the complete, original Round 1 Proposal submissions.

3.3.15 Certified Disadvantaged Business Outreach Plan (Not Scored)

Proposer shall complete and submit *Certified Disadvantaged Business Outreach Plan* (Attachment F).

3.3.16 Responsibility Inquiry (Not Scored)

Proposer shall complete and submit *Responsibility Inquiry* (Attachment G).

Agency must find that Proposer is Responsible in order to award a Contract. Agency may, at any time, find a Proposer to be not Responsible and excuse the Proposer from further participation in the RFP process.

3.3.17 Digital Accessibility (Not Scored)

Proposer shall complete and submit a *Digital Accessibility Narrative* (Attachment K).

Proposer must demonstrate its proposed Solution meets all applicable digital accessibility requirements in all material respects. Provide a completed Accessibility Compliance Report (ACR) that provides information on the proposed Solution's conformance with WCAG 2.2 level A and AA success criteria.

- Proposer's submitted ACR must be based on the latest version of the WCAG

Voluntary Product Accessibility Template (VPAT®) that evaluates conformance with WCAG 2.2 Level A and AA success criteria.

- The submitted ACR should be no more than 12 months old at the time of submission, accurately reflect the current accessibility state of the proposed service solution, be specific to the product or service and the version(s) proposed for use, be completed by qualified personnel knowledgeable in digital accessibility and the proposed System and be provided in an accessible format.
- If the ACR indicates deficiencies, Proposer must include a proposed remediation plan that specifically addresses mitigation measures it will take prior to remediation.
- If an ACR is not available or is more than 12 months old, Proposer must clearly state this and provide contextual information supporting Agency's evaluation of the Proposal.

3.3.18 Digital Accessibility Narrative. Complete and return Attachment K, Digital Accessibility Narrative, with Proposer's Technical Proposal.

SECTION 4: SOLICITATION PROCESS

4.1 PUBLIC NOTICE

The RFP and attachments are published in the State of Oregon's electronic procurement system OregonBuys at <https://oregonbuys.gov/>. Documents will not be mailed to prospective Proposers.

Modifications, if any, to this RFP will be made by written Amendment(s) published in OregonBuys. Prospective Proposer is solely responsible for checking OregonBuys to determine whether or not any Amendment(s) have been issued. Amendment(s) are incorporated into the RFP by this reference.

4.2 OREGONBUYS

All Proposers must be registered in OregonBuys to do business with the State. Registration is free. To create a vendor account, click the blue "Register" button in the top right corner of the OregonBuys website: <https://oregonbuys.gov/bsa>. For registration assistance, see vendor registration guidance.

PROPOSER IS SOLELY RESPONSIBLE FOR ENSURING THEIR VENDOR INFORMATION IS CURRENT AND CORRECT IN OREGONBUYS. AGENCY WILL ACCEPT NO RESPONSIBILITY FOR MISSING OR INCORRECT VENDOR INFORMATION OR ALTERNATIVE ACCESSIBILITY TO AMENDMENT(S), ATTACHMENTS, AND EXHIBITS.

OregonBuys Assistance. Parties needing assistance with OregonBuys may contact the

OregonBuys Helpdesk by telephone at (855) 800-5046 or by email at support.oregonbuys@oregon.gov.

4.3 PRE-PROPOSAL CONFERENCE

A Pre-Proposal conference will be held at the date and time listed in the Schedule. Prospective Proposers' participation in this conference is highly encouraged but not mandatory.

The purpose of the Pre-Proposal conference is to:

- Provide additional description of the project;
- Explain the RFP process; and
- Answer any questions Proposers may have related to the project or the process.

Statements made at the Pre-Proposal conference are not binding upon Agency. Proposers may be asked to submit questions in Writing.

Interested parties may participate in the Pre-Proposal Conference by:

The Pre-Proposal meeting will be held on the date and time listed in Section 1.2 (Schedule). Meeting access details are provided below:

Microsoft Teams meeting

Join:

<https://teams.microsoft.com/meet/254979680274570?p=8YWFKvqHLXj9PIpxMu>

Meeting ID: 254 979 680 274 570

Passcode: DT9yp7Gj

[Need help?](#) | [System reference](#)

Dial in by phone

[+1 971-277-2343,,61413847#](#) United States, Portland

[Find a local number](#)

Phone conference ID: 614 138 47#

4.4 QUESTIONS / REQUESTS FOR CLARIFICATIONS

All inquiries, whether relating to the RFP process, administration, deadline or method of award, or to the intent or technical aspects of the RFP must:

- Be delivered to the SPC via an OregonBuys submission;
- Reference the OregonBuys bid number ;
- Identify Proposer's name and contact information;

- Refer to the specific area of the RFP being questioned (i.e. page, section and paragraph number); and
- Be received by the due date and time for Questions/Requests for Clarification identified in the Schedule in Section 1.2.

4.5 SOLICITATION PROTESTS

4.5.1 Protests to RFP

Prospective Proposer may submit a Written protest of anything contained in this RFP, including but not limited to, the RFP process, Specifications, Scope of Work, and the proposed Sample Contract. This is prospective Proposer's only opportunity to protest the provisions of the RFP, except that Proposer may protest Amendment(s) as provided below and Proposer may take exception to the terms and conditions of the Sample Contract marked as negotiable as set forth in the Negotiations Section.

4.5.2 Protests to Amendment(s)

Prospective Proposer may submit a Written protest of anything contained in an Amendment. Protests to an Amendment, if issued, must be submitted by 5:00 p.m. Pacific Time on the second Business Day following the issuance of the Amendment or the date/time specified in the Amendment, or they will not be considered. Protests of matters not added or modified by the Amendment will not be considered.

4.5.3 Requirements for Protests

All protests must:

- Be delivered to the SPC via email;
- Reference the OregonBuys bid number;
- Identify prospective Proposer's name and contact information;
- Be sent by an authorized representative;
- State the reason for the protest, including:
 - the grounds that demonstrate how the Procurement Process is contrary to law, Unnecessarily Restrictive, legally flawed, or improperly specifies a brand name; and
 - evidence or documentation that supports the grounds on which the protest is based; and
- State the proposed changes to the RFP provisions or other relief sought.

Protests to the RFP must be received by the due date and time identified in the Schedule.

Protests to an Amendment must be received by the due date identified in the Amendment.

4.6 PROPOSAL DELIVERY OPTIONS

Proposer is solely responsible for ensuring its Proposal is received by the SPC in accordance with the RFP requirements before Opening. Agency is not responsible for any delays in mail or by common carriers or by transmission errors or delays, or for any mis-delivery for any reason. A Proposal submitted by any means not authorized below will be rejected. The following delivery options are permitted for this RFP:

Delivery through OregonBuys

Proposal submission should be electronically through OregonBuys at: OregonBuys.gov

Detailed instructions on how to submit a Proposal can be found at [OregonBuys Vendor Formal Solicitation Response.pdf](#)

4.7 PROPOSAL MODIFICATION OR WITHDRAWAL

If a Proposer wishes to make modifications to a submitted Proposal, the Proposer must submit its modification in one of the authorized methods listed in Section 4.6 (Proposal Delivery Options). To be effective the modification must include the OregonBuys bid number and be submitted to the SPC prior to Opening.

If a Proposer wishes to withdraw a submitted Proposal, it must submit a Written notice signed by an authorized representative of its intent to withdraw to the SPC via email prior to the Opening in accordance with OAR 125-247-0440. To be effective the notice must include the OregonBuys bid number.

4.8 PROPOSAL DUE

A Proposal (including all required submittal items) must be received by the SPC on or before Opening. All Proposal modifications or withdrawals must also be received prior to Opening.

A Proposal received after Opening is considered LATE and will NOT be accepted for evaluation. A late Proposal will be returned to the Proposer or destroyed.

4.9 PUBLIC OPENING

There will be no public Opening of Proposals. Proposals received will not be available

for inspection until after the evaluation process has been completed and the notice of Intent to Award is issued pursuant to OAR 125-247-0630. However, Agency will record and make available the identity of all Proposers after Opening.

4.10 PROPOSAL REJECTION

Agency may reject a Proposal for any of the following reasons:

- Proposer fails to substantially comply with all prescribed RFP procedures and requirements, including but not limited to the requirement that Proposer's authorized representative sign the Proposal.
- Proposer has liquidated and delinquent debt owed to the State or any department or agency of the State.
- Proposer fails to meet the responsibility requirements of ORS 279B.110.
- Proposer makes any contact regarding this RFP with State representatives such as State employees or officials other than the SPC or persons authorized by the SPC, or inappropriate contact with the SPC.
- Proposer attempts to influence a member of the Evaluation Committee.
- Proposal is conditioned on Agency's acceptance of any other terms and conditions or rights to negotiate any alternative terms and conditions that are not reasonably related to those expressly authorized for negotiation in the RFP or Amendment(s).

4.11 EVALUATION PROCESS

4.11.1 Responsiveness and Responsibility Determination

4.11.1.1 Responsiveness determination

A Proposal received prior to Opening will be reviewed to determine if it is Responsive to all RFP requirements including compliance with Section 3.1 (Minimum Qualifications) and Section 3.2 (Minimum Submission Requirements). If the Proposal is unclear, the SPC may request clarification from Proposer. However, clarifications may not be used to rehabilitate a non-Responsive proposal. If the SPC finds the Proposal non-Responsive, the Proposal may be rejected; however, Agency may waive mistakes in accordance with OAR 125-247-0470.

4.11.1.2 Responsibility Determination

Agency will determine if an apparent successful Proposer is Responsible prior to award and execution of the Contract. Proposers shall submit a signed Responsibility Inquiry form (Attachment G) with Proposal.

At any time prior to award, Agency may reject a Proposer found to be not

Responsible.

4.11.2 Evaluation Criteria

Scoring Explanation Table	
Score	Explanation
90 – 100%	OUTSTANDING - Proposal meets submittal requirements, demonstrates exceptional knowledge of the subject matter, and demonstrates excellent ability to deliver the requested service and achieve the desired goals and objectives of the project as defined in this RFP.
61 – 89%	GOOD TO VERY GOOD – Response meets submittal requirements, demonstrates thorough knowledge of the subject matter, and demonstrates an ability to successfully deliver the requested service and support the project in achieving its goals and objectives as defined in this RFP.
50 – 60%	SATISFACTORY – Response meets submittal requirements, demonstrates basic knowledge of the subject matter, and demonstrates an ability to minimally deliver the requested service. Would not meet or support the achievement of all the desired goals and objectives of the project as defined in this RFP.
1 – 49%	POOR TO FAIR – Response meets submittal requirements but does not demonstrate satisfactory knowledge of the subject matter or does not demonstrate an ability to deliver requested service or support the program in achieving its desired goals and objectives as defined in this RFP.

Each Proposal meeting all Responsiveness requirements will be independently evaluated by members of an Evaluation Committee. Evaluation Committee members may change and Agency may have additional or fewer evaluators for optional rounds of competition. Evaluators will assign a score for each evaluation criterion listed below in this Section 4.11.2 up to the maximum points available as specified in Section 4.12 (Point and Score Calculation).

SPC may request further clarification to assist the Evaluation Committee in gaining additional understanding of a Proposal. A response to a clarification request may only clarify or explain portions of the already submitted Proposal and may not contain new information not included in the original Proposal.

4.11.2.1 Proposer Organizational Profile (100 Points)

Degree to which Proposer demonstrates how the organization can effectively deliver the Services described in this RFP.

4.11.2.2 Experience and Capabilities (300 Points)

Does Proposer demonstrate sufficient experience in providing the Services and Capabilities, including the Project Samples?

4.11.2.3 Key Persons, Organizational Chart and Subcontractors (200 Points)

Degree to which Proposer shall provide a sufficient number of Key Persons and support personnel qualified by experience, credentials, and capabilities to deliver the requested services.

4.11.2.4 Solution Security Requirements (200 Points)

Degree to which Proposer addresses the Solution Security Requirements (Attachment J).

4.11.2.5 Solution Work Requirements (a- Narrative=656 Points and b- Attachment H = 344)

The Attachment H spreadsheet will automatically tabulate Proposer's score based upon Proposer's responses with a maximum point value of 344. Evaluators will review the Attachment H responses by Proposer during evaluation and may revise final score based on submitted comments.

The degree to which Proposer's narrative response to the high-level requirement categories set forth in Section 2.4 meets the evaluation criteria will be assessed independently from Attachment H. The Evaluation Committee will score the narrative response separately, with a maximum of 656 points.

4.11.2.6 SLAs (200 Points)

Degree to which Proposer provides desirable and relevant service level agreements.

4.11.2.7 Live Demonstration Evaluation (1000 Points)

Vendors advancing from Round 1 will be invited to deliver a live product demonstration evaluated by a panel of four judges. Each judge scores independently out of 250 points across six weighted categories, for a combined maximum of 1,000 points per vendor.

4.11.2.8 Cost & Contracting Flexibility Evaluation (1000 Points)

As part of Round 2, vendors are also evaluated on their proposed costs and contract flexibility by the same panel of four judges. Each judge scores independently out of 250 points across four weighted components, for a

combined maximum of 1,000 points per vendor. Round 2A and 2B scores are combined for a 2,000 point Round 2 total.

The price proposal will be assessed against the agency’s available budget for measure reporting services, total cost of implementation, and ongoing support costs.

The vendor will also be evaluated on the flexibility to modify scope including add/remove measures post-contract, and estimated time/cost to implement the changes.

4.12 EVALUATION SUMMARY: POINT AND SCORE CALCULATIONS

4.12.1

TOTAL POINTS POSSIBLE :	4000
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ROUND 1 POINTS POSSIBLE		2000
4.11.2.1	Organizational Profile	100
4.11.2.2	Experience & Capabilities	300
4.11.2.3	Key Persons, Organizational Chart, Subcontractor	200
4.11.2.4	Solution Security Requirements (Attachment J)	200
4.11.2.5	Solution Work Requirements (Scope of Services Narrative and Attachment H Spreadsheet)	1000
4.11.2.6	Service Level Agreements (SLAs)	200

ROUND 2 POINTS POSSIBLE		2000
4.11.2.7	Live Demonstration Evaluation	1,000
4.11.2.8	Cost and Contracting Flexibility Evaluation	1,000

4.12.2 PRICE EVALUATION

The SPC will conduct the price evaluation. The SPC will award a price score to each Price Proposal based upon the percentage of the proposed price as compared to the lowest Proposer’s price using the following formula:

$$\frac{\text{lowest price of all Proposers}}{\text{price being scored}} \times \text{price points possible} = \text{price score}$$

4.12.3 PREFERENCES

4.12.3.1 Reciprocal Preference

For evaluation purposes per OAR 125-246-0310, Agency shall add a percentage increase to each out-of-state Proposer's Proposal price that is equal to the percentage preference, if any, given to a Resident Proposer in the [Proposer's state](#).

4.12.3.2 Recycled Materials

Agency will give preference to Goods manufactured from Recycled Materials if each of the conditions specified in ORS 279A.125 (2) exists following any adjustments made to the price of the Goods according to any applicable reciprocal preference.

4.12.3.3 Tiebreakers

If Agency receives Proposals identical in price, fitness, availability and quality and chooses to award a Contract, Agency shall award the Contract in accordance with the procedures outlined in OAR 137-046-0300.

4.13 ROUND 1 RANKING OF PROPOSERS

The SPC will average the scores for each Proposal in a given round of competition (calculated by totaling the points awarded by each Evaluation Committee member and dividing by the number of members).

After any applicable preference has been applied, the SPC will determine the rank of each Proposal, with the highest score receiving the highest rank, and successive rank order determined by the next highest score.

Agency may, in Agency's sole discretion, determine an apparent successful Proposer with no additional rounds of competition. If additional rounds are conducted, Agency will rank advancing Proposers at the conclusion of each subsequent round and may determine an apparent successful Proposer at any time during the solicitation process.

4.14 NEXT STEP DETERMINATION

At the conclusion of a round of competition, Agency may choose to conduct additional round(s) of competition if in the best interest of the State. Additional rounds of competition may consist of, but will not be limited to:

- Interviews
- Presentations/Demonstrations/Additional Submittal Items

- Discussions and submittal of revised Proposals
- Serial or simultaneous negotiations
- Best and Final Offers

4.14.1 Competitive Range Determination

If Agency, in its sole discretion, determines that one or more additional rounds of competition is necessary, it will select a Competitive Range to indicate the Proposers that will be invited to participate in a subsequent round. The Competitive Range may include all, or at Agency's sole discretion, some (based primarily on a natural break in the distribution of scores), of the Proposers from a previous round. Agency will post a notice in OregonBuys of its Competitive Range Determination and provide details about the process and schedule for the subsequent round.

4.14.2 Competitive Range Protest

Proposers excluded from a round may submit a Written protest of Competitive Range. Protests must:

- Be emailed to the SPC;
- Reference the OregonBuys bid number;
- Identify Proposer's name and contact information;
- Be sent by an authorized representative
- State the reason for the protest; and
- Be received within 7 calendar days after issuance of the Notice of the Competitive Range unless a different due date and time is specified in such notice.

Agency will address all protests within a reasonable time and will issue a Written decision to the respective Proposer. Protests that do not include the required information may not be considered by Agency.

4.15 ADDITIONAL ROUNDS

4.15.1 Demonstrations and/or Interviews

Proposers progressing to Round 2 will be invited to participate in Proposer demonstrations and/or interviews. Participation will be via teleconference. Further details will be included with Notice of Competitive Range.

4.15.2 Best and Final Offers

Proposers in the Competitive Range may submit Best and Final Offers. The written Best and Final Offer ("Revised Proposal") must be submitted on or before the due

date and time set forth in the notice of Competitive Range and must be delivered to the Single Point of Contact. **LATE REVISED PROPOSALS WILL NOT BE ACCEPTED.**

If Proposer elects not to submit a Revised Proposal, Proposer's initial Proposal will be accepted as the Best and Final Offer and evaluated accordingly.

Best and Final Offer Requirements

Best and Final Offers must be submitted in writing in the form of an amendment to the Proposer's initial Proposal. Best and Final Offers must comply with the following requirements and specifications:

- Identify Proposer's business name and reference RFP S-44300-00017084; and
- Submit One (1) copy of the revised Proposal with original Signature, identified as the "master"; and
- Clearly identify the information included Proposer's initial Proposal that Proposer intends to amend or replace in terms of the page, section and paragraph of Proposer's initial proposal; and
- Include the replacement information, which shall comply with the requirements of the respective sections and items being amended or replaced; and
- Include a Best and Final Offer letter, signed in ink by Proposer's authorized representative, which summarizes the Proposal aspects amended by the Best and Final Offer and states that the information included in the Best and Final Offer supersedes the corresponding information included in Proposer's Proposal submitted on or before **[date to be inserted, if applicable]**; and
- Include all information requested in the Best and Final Offer letter.

4.16 SCORING AND RANKING OF PROPOSERS FOR SUBSEQUENT ROUNDS

If Agency conducts two or more rounds of competition, the SPC will determine the cumulative score for Proposers advancing through all rounds of competition by adding the scores from each completed round. The Proposer with the highest cumulative score will receive the highest final ranking.

SECTION 5: AWARD AND NEGOTIATION

5.1 AWARD NOTIFICATION PROCESS

5.1.1 Award Consideration

Agency, if it awards a Contract, will award a Contract to the highest ranking

Responsible Proposer(s) based upon the scoring methodology and process described in Section 4. Agency may award less than the full Scope of Work described in this RFP.

5.1.2 Intent to Award Notice

Agency will notify all Proposers in Writing that Agency intends to award a Contract to the selected Proposer(s) subject to successful negotiation of any negotiable provisions.

5.2 INTENT TO AWARD PROTEST

5.2.1 Protest Submission

An Affected Proposer shall have 7 calendar days from the date of the Intent to Award notice to file a Written protest.

A Proposer is an Affected Proposer only if the Proposer would be eligible for Contract award in the event the protest was successful and is protesting for one or more of the following reasons as specified in ORS 279B.410:

- All higher ranked Proposals are non-Responsive.
- Agency has failed to conduct an evaluation of Proposals in accordance with the criteria or process described in the RFP.
- Agency abused its discretion in rejecting the protestor's Proposal as non-Responsive.
- Agency's evaluation of Proposal or determination of award otherwise violates ORS Chapter 279B or ORS Chapter 279A.

If Agency receives only one Proposal, Agency may dispense with the evaluation process and Intent to Award protest period and proceed with Contract Negotiations and award.

5.2.1.1 Protest Requirements

Protests must:

- Be delivered to the SPC via email;
- Reference the OregonBuys bid number;
- Identify Proposer's name and contact information;
- Be signed by an authorized representative of Proposer;
- Specify the grounds for the protest; and
- Be received within 7 calendar days of the Intent to Award notice.

5.2.2 Response to Protest

Agency will address all timely submitted protests within a reasonable time and will issue a Written decision to the respective Proposer. Protests that do not include the required information may not be considered by Agency.

5.3 APPARENT SUCCESSFUL PROPOSER SUBMISSION REQUIREMENTS

5.3.1 Insurance

Prior to award, Proposer shall secure and demonstrate to Agency proof of insurance as required in this RFP or as negotiated. Insurance Requirements are found in Exhibit B of Attachment A.

5.3.2 Taxpayer Identification Number

Proposer shall provide its Taxpayer Identification Number (TIN) and backup withholding status on a completed W-9 form when requested by Agency or when the backup withholding status or any other relevant information of Proposer has changed since the last submitted W-9 form, if any.

5.3.3 Business Registry

If selected for award, Proposer shall be duly authorized by the State of Oregon to transact business in the State of Oregon before executing the Contract. Visit <http://sos.oregon.gov/business/pages/register.aspx> for Oregon Business Registry information.

5.3.4 Responsibility Inquiry

Prior to award, Proposer shall be required to complete and submit Attachment G — Responsibility Inquiry.

5.3.5 Pay Equity Certification

If selected for award and the Contract value exceeds \$500,000 and Proposer employs 50 or more full-time workers, Proposer shall submit to Agency a true and correct copy of an unexpired Pay Equity Compliance Certificate, issued to the Proposer by the Oregon Department of Administrative Services. For instructions on how to obtain the Certificate, visit

<https://www.oregon.gov/das/Procurement/Pages/PayEquity.aspx>.

ORS 279B.110(2)(f) requires that Proposer provide this prior to execution of the Contract.

5.3.6 Nondiscrimination in Employment

As a condition of receiving the award of a Contract under this RFP, Proposer must

certify by its Signature on Attachment C - Proposer Information and Certification Sheet, in accordance with ORS 279A.112, that it has in place a policy and practice of preventing sexual harassment, sexual assault, and discrimination against employees who are members of a protected class. The policy and practice must include giving employees a written notice that the policy both prohibits, and prescribes disciplinary measures for, conduct that constitutes sexual harassment, sexual assault, or unlawful discrimination.

5.4 CONTRACT NEGOTIATION

5.4.1 Negotiation

After selection of a successful Proposer, Agency may enter into Contract negotiations with the successful Proposer. By submitting a Proposal, Proposer agrees to comply with the requirements of the RFP, including the terms and conditions of the Sample Contract (Attachment A), with the exception of those terms listed below for negotiation.

Proposer shall review the attached Sample Contract and note exceptions.

Proposer must submit those exceptions to Agency during the Questions / Requests for Clarification period set forth in Section 1.2. If Agency agrees to make any requested changes to the Sample Contract, Agency will issue an Amendment to notify Proposers of such changes. Unless Agency issues an Amendment modifying any of the terms and conditions, Agency intends to enter into a Contract with the successful Proposer substantially in the form set forth in Sample Contract (Attachment A).

Following the selection of the apparent successful Proposer, Agency may agree to negotiate changes to the negotiable provisions of the Sample Contract listed below. However, Agency is not required to make any changes and many provisions cannot be changed. Proposer is cautioned that the State of Oregon believes modifications to the standard provisions constitute increased risk and increased cost to the State.

Any subsequent negotiated changes are subject to prior approval of the Oregon Department of Justice.

Agency is willing to negotiate **ONLY** the Statement of Work and the following terms and conditions:

In the event that the parties have not reached mutually agreeable terms within 30 calendar days, Agency, at its discretion, may terminate Negotiations and commence Negotiations with the next highest ranking Proposer.

5.4.2 Reserved

5.4.3 Approval

After Contract negotiations have concluded between Agency and the successful Proposer, the Contract will be subject to one or more approvals prior to contract execution.

SECTION 6: ADDITIONAL INFORMATION

6.1 COMMITMENT TO DIVERSITY, EQUITY, AND INCLUSION

The State of Oregon is committed to taking active steps toward increasing and promoting diversity, equity, and inclusion values across procurement processes for minority, women, emerging small, and service-disabled veteran owned businesses by reducing barriers to compete for and be awarded state contracts. All interested businesses are encouraged to submit proposals for this contracting opportunity.

6.2 CERTIFIED FIRM PARTICIPATION

Pursuant to Oregon Revised Statute (ORS) Chapter 200, Agency encourages the participation of small businesses, certified by the Oregon Certification Office for Business Inclusion and Diversity ("COBID") in all contracting opportunities. This includes certified small businesses in the following categories: disadvantaged business enterprise, minority-owned business, woman-owned business, a business that a service-disabled veteran owns or an emerging small business. Agency also encourages joint ventures or subcontracting with certified small business enterprises. For more information, visit:

<https://oregon4biz.diversitysoftware.com/FrontEnd/VendorSearchPublic.asp?XID=6787&TN=oregon4biz>

If the Contract has potential subcontracting opportunities, the successful Proposer may be required to submit a completed Certified Disadvantaged Business Outreach Plan (Attachment F) prior to execution.

6.3 GOVERNING LAWS AND REGULATIONS

This RFP is governed by the laws of the State of Oregon. Venue for any administrative or judicial action relating to this RFP, evaluation and award is the Circuit Court of Marion County for the State of Oregon; provided, however, if a proceeding must be brought in a federal forum, then it must be brought and conducted solely and exclusively within the United States District Court for the District of Oregon. In no event shall this Section 6.2 be construed as a waiver by the State of Oregon of any form of defense or immunity, whether sovereign immunity, governmental immunity, immunity based on the eleventh amendment to the Constitution of the United States or otherwise, to or from any claim or consent to the jurisdiction of any court.

6.4 OWNERSHIP/PERMISSION TO USE MATERIALS

All Proposals are public records and are subject to public inspection after Agency issues the Notice of Intent to Award. Application of the Oregon Public Records Law will determine whether any information is exempt from disclosure.

All Proposals submitted in response to this RFP become the Property of Agency. By submitting a Proposal in response to this RFP, Proposer grants the State a non-exclusive, perpetual, irrevocable, royalty-free license for the rights to copy, distribute, display, prepare derivative works of and transmit the Proposal solely for the purpose of evaluating the Proposal, negotiating a Contract, if awarded to Proposer, or as otherwise needed to administer the RFP process, and to fulfill obligations under Oregon Public Records Law (ORS 192.311 through 192.478). Proposals, including supporting materials, will not be returned to Proposer, except in the case of Proposals that were submitted late and rejected by Agency.

6.5 CANCELLATION OF RFP; REJECTION OF PROPOSAL; NO DAMAGES.

Pursuant to ORS 279B.100, Agency may reject any or all Proposals in-whole or in-part, or may cancel this RFP at any time when the rejection or cancellation is in the best interest of the State or Agency, as determined by Agency. Neither the State nor any State agency is liable to any Proposer for any loss or expense caused by or resulting from the delay, suspension, or cancellation of the RFP or a Contract award, or the rejection of any Proposal.

6.6 COST OF SUBMITTING A PROPOSAL

Proposer shall pay all costs incurred in connection with its Proposal, including, but not limited to, the costs to prepare and submit the Proposal, costs of samples and other supporting materials, costs to participate in demonstrations, and costs associated with protests.

6.7 STATEWIDE E-WASTE/RECOVERY PROCEDURE

If applicable, Proposer shall include information in its Proposal that demonstrates compliance with the Statewide E-Waste/Recovery Procedure #107-011-050_PR. Visit the DAS website www.oregon.gov/das and use the search bar feature to locate the procedure.

6.8 RECYCLABLE PRODUCTS

Proposer shall use recyclable products to the maximum extent economically feasible in the performance of the Services or Work described in this RFP and the subsequent Contract. (ORS 279B.025)