



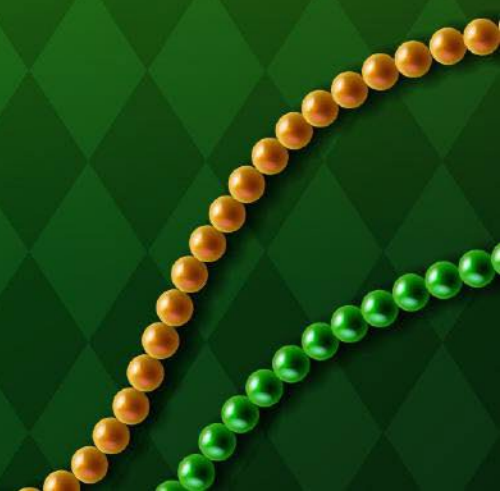
# The Carnivàle of Risk

The Carnivàle of Proposals –  
To RFI, RFQ or RFP: Which One is Right for you?

Monday, February 28, 2022  
2:00 p.m. – 3:15 p.m  
Moderator: John Lord

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# PRESENTED BY:

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Marcus Beverly  
Alliant



Courtney Chase  
City of Chula Vista



Agnes Hoerberling  
Intercare Holdings Inc



Tyrone Spears, ARM,  
City of Los Angeles



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# SESSION SUMMARY

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Developing a request for proposal (RFP) allows you to identify the right vendor to solve your organizational challenges. However, receiving the best proposals that will help you accurately evaluate vendor capabilities begins with a well-written RFP. In this session, the panel will:

- a. Provide guidance and helpful recommendations for writing an effective RFP or improve the one you have.
- b. Discuss what prospective vendors need to know about your project in order to provide an accurate bid and remove misunderstanding.
- c. Discuss the importance of clarity to reduce questions from bidders, reducing the research you need to do to provide answers.



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# DEFINITIONS

RFI	RFQ	RFP
<ul style="list-style-type: none"><li>Request for <b>Information</b></li></ul>	<ul style="list-style-type: none"><li>Request for a <b>Quote</b></li></ul>	<ul style="list-style-type: none"><li>Request for <b>Proposal</b></li></ul>
<ul style="list-style-type: none"><li>First step to a solicitation for proposal.</li></ul>	<ul style="list-style-type: none"><li>Focus almost exclusively on cost.</li></ul>	<ul style="list-style-type: none"><li>A document that solicits a proposal through a bidding process.</li></ul>
<ul style="list-style-type: none"><li>Issued when an agency does not know what solutions are available.</li></ul>	<ul style="list-style-type: none"><li>Sometimes used as an informal solicitation for a quote.</li></ul>	<ul style="list-style-type: none"><li>Agency or company's intent to purchase goods, products, services or solutions.</li></ul>
<ul style="list-style-type: none"><li>Collects general information.</li></ul>	<ul style="list-style-type: none"><li>Usually by invitation only to a short list of vendors.</li></ul>	<ul style="list-style-type: none"><li>Contain an intent to purchase or award a contract.</li></ul>
<ul style="list-style-type: none"><li>Can be used to short list vendors for an RFQ or RFP.</li></ul>		
<ul style="list-style-type: none"><li>No intent to purchase.</li></ul>		



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# COMMON THREAD

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RFI

RFQ

RFP

- 🦋 Issuance of RFI, RFQ or RFP.
- 🦋 Collecting the response from vendors/proposers.
- 🦋 Evaluating the best suitable vendor/partner.
- 🦋 Making a decision to select a winning bid.



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# TO RFI, RFQ OR RFP

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- 🦋 When is it appropriate?
- 🦋 Pros and Cons.
- 🦋 Goals and objectives.



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# WHAT TO INCLUDE IN AN RFI

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- 🦋 Goals and Objectives.
- 🦋 Background of your organization.
- 🦋 Qualifications you are looking for.
- 🦋 Information you are requesting and what you hope to learn.
- 🦋 Evaluation Criteria.
- 🦋 Timeline – deadline.



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# WHAT TO INCLUDE IN AN RFQ

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- 🦋 Goals and Objectives – what you hope to accomplish
- 🦋 Agency background or organizational overview.
- 🦋 Project detail – scope of work to be done.
- 🦋 Minimum qualification requirement.
- 🦋 General terms and conditions.
- 🦋 Pricing template - Clearly outline how the vendor should propose the quote including a standard pricing format.
- 🦋 Who will be invited to respond.
- 🦋 How will pricing be evaluated. Open or sealed bid.
- 🦋 Deadline.



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# REQUEST FOR PROPOSAL

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Things to consider before you write:

- 🦋 Why is there a need?
- 🦋 Goals and Objectives.
- 🦋 Conduct an initial assessment/evaluation.
- 🦋 Gather requirements from stakeholders.
- 🦋 Collect data and other information needed for pricing.
- 🦋 Publication method, Public or Invitation Only.
- 🦋 Using outside consultants – pros and cons.



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# WRITING THE RFP

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Watch grammar/typos!



## Introduction

- 0 Program background.
- 0 Goals, what you re hoping to achieve, end result.



## RFP Timing

- 0 Timeframes – reasonable timeline.
- 0 30-45 days to respond.
- 0 Give yourself time to implement program properly if you are serious about making a change.



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# SCOPE OF WORK

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 Qualifications and Experience


 Staffing Requirement

 Based on FTE

- **Designated** Staff are not exclusive to your program – they handle other programs in addition to your program.
- **Dedicated** Staff – exclusively handle your program.

 Based on **Caseload** – staff is determined by your claim volume and *required* caseload.

 Capabilities

 Systems (reporting new claims, ad hoc reports, claim systems)

 Best practices, Operating procedures, Process



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# TPA AND MC SERVICES

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## Bundled or Unbundled Services

- Know your options
- Pros and Cons

## Bill Review

- Understand the pricing methodology
- Not all services are the same, technology and network matters

## Utilization Review

- Understanding UR mandate
- URAC accreditation requirement
- Access to Medical Advisors

## Case Management

- Telephonic vs Field – big difference in pricing



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# THINKING BEYOND FEES AND BUDGET

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## Review aggregate cost:

- ① Evaluate cost of ancillary/manage care services.
- ① Be prepared to provide data.
- ① Not all services are the same.
- ① Technology drives efficiency.



## Pricing evaluation – 20% max.



## Don't box yourself in or be stingy.



## Apples to apples comparison.



## Conduct your due diligence.



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# OTHER CONSIDERATION

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## Special Conditions:

- 0 SBE/LBE's, DBE/MBE/DVBE's
- 0 Insurance requirements (Cyber, Crime and E&O's)
- 0 Financial Capability



## References

- 0 Past
- 0 Current



## Evaluation Criteria

- 0 Understanding of role
- 0 Staffing and experience
- 0 Approach, Methods and best practices



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# TO INTERVIEW PROSPECTS OR NOT

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- 🦋 Create a short list to interview.
- 🦋 Value and insight that can be gained by interviewing proposers. If you decide not to interview, be thorough in checking references and read between the lines.
- 🦋 Conduct due diligence.
- 🦋 Decide on Interview panel (departmental representatives; other agencies or reps outside your organization).
- 🦋 Ask bidders to bring the *entire* proposed team if possible.
- 🦋 Ask for a system demonstration.



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# FINAL SELECTION

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- 🦋 Consider potential decision process when setting timeline.
- 🦋 Communicate delays if unable to meet dates.
- 🦋 Conducting proper due diligence – don't rush.
- 🦋 Verify your numbers/scores.



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# CONTRACT

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- 🦋 Consider possible challenges or roadblocks.
- 🦋 Address possible issues in the contract.
- 🦋 Clear understanding of what is required in the contract.
- 🦋 Data transition and cost of transition.
- 🦋 Project implementation.



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# Questions?

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**THANK YOU!**



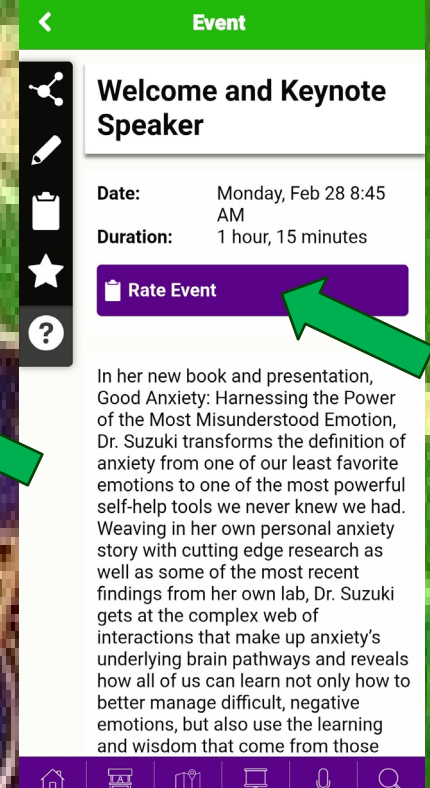
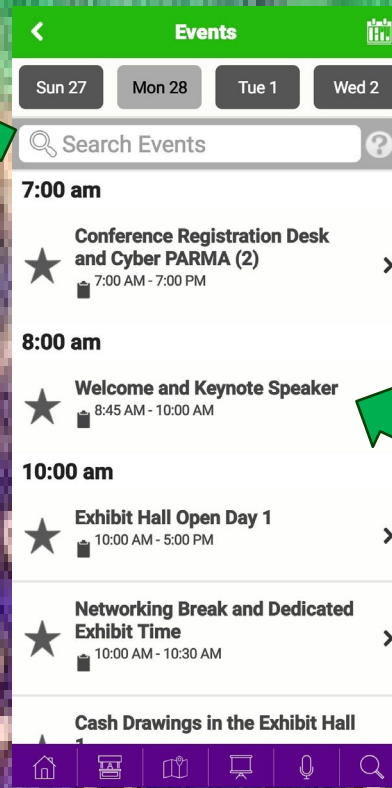
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