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**STATE OF NORTH CAROLINA**

**Division of Mental Health, Developmental Disabilities and Substance Use Services (DMHDDSUS)**

**Request for Proposal #: 30-25190-DMH**

**Person-Centered Practice Collaborative**

**Date of Issue: March 19, 2025**

**Proposal Opening Date: April 8, 2025**

**At ­­­ 2PM ET**

**Direct all inquiries concerning this RFP to:**

Jace Bounds

Procurement Specialist

Email: jace.bounds@dhhs.nc.gov



**STATE OF NORTH CAROLINA**

**Request for Proposal #**

**30-25190-DMH**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

For internal State agency processing, including tabulation of proposals, provide your company’s eVP (Electronic Vendor Portal) Number. Pursuant to G.S. 132-1.10(b) this identification number shall not be released to the public. **This page will be removed and shredded, or otherwise kept confidential**, before the procurement file is made available for public inspection.

**This page shall be filled out and returned with your proposal.  
Failure to do so may subject your proposal to rejection.**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Vendor Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Vendor eVP#

**Note**: For a contract to be awarded to you, your company (you) must be a North Carolina registered vendor in good standing. You must enter the vendor number assigned through eVP (Electronic Vendor Portal). If you do not have a vendor number, register at

<https://vendor.ncgov.com/vendor/login>

|  |  |
| --- | --- |
| **STATE OF NORTH CAROLINA**  **Division of Mental Health, Developmental Disabilities and Substance Use Services (DMHDDSUS)** | |
| **Refer *ALL* Inquiries regarding this RFP to the procurement lead through the Message Board in the Sourcing Tool. See section 2.2 for details:** | **Request for Proposal #: 30-25190-DMH** |
| **Proposals will be publicly opened: April 8, 2025 @ 2pm ET** |
| **Using Agency: DMHDDSUS** | **Commodity No. and Description: 851017 Health administration services** |
| **Requisition No.:** |

**EXECUTION**

In compliance with this Request for Proposals (RFP), and subject to all the conditions herein, the undersigned Vendor offers and agrees to furnish and deliver any or all items upon which prices are bid, at the prices set opposite each item within the time specified herein.

By executing this proposal, the undersigned Vendor understands that false certification is a Class I felony and certifies that:

* this proposal is submitted competitively and without collusion (G.S. 143-54),
* none of its officers, directors, or owners of an unincorporated business entity has been convicted of any violations of Chapter 78A of the General Statutes, the Securities Act of 1933, or the Securities Exchange Act of 1934 (G.S. 143-59.2), and
* it is not an ineligible Vendor as set forth in G.S. 143-59.1.

Furthermore, by executing this proposal, the undersigned certifies to the best of Vendor’s knowledge and belief, that:

* it and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal or State department or agency.

As required by G.S. 143-48.5, the undersigned Vendor certifies that it, and each of its sub-Contractors for any Contract awarded as a result of this RFP, complies with the requirements of Article 2 of Chapter 64 of the NC General Statutes, including the requirement for each employer with more than 25 employees in North Carolina to verify the work authorization of its employees through the federal E-Verify system.

As required by Executive Order 24 (2017), the undersigned vendor certifies will comply with all Federal and State requirements concerning fair employment and that it does not and will not discriminate, harass, or retaliate against any employee in connection with performance of any Contract arising from this solicitation.

G.S. 133-32 and Executive Order 24 (2009) prohibit the offer to, or acceptance by, any State Employee associated with the preparing plans, specifications, estimates for public contracts; or awarding or administering public contracts; or inspecting or supervising delivery of the public contract of any gift from anyone with a contract with the State, or from any person seeking to do business with the State. By execution of this response to the RFP, the undersigned certifies, for Vendor’s entire organization and its employees or agents, that Vendor is not aware that any such gift has been offered, accepted, or promised by any employees of your organization.

By executing this bid, Vendor certifies that it has read and agreed to the **INSTRUCTION TO VENDORS** andthe **NORTH** **CAROLINA GENERAL TERMS AND CONDITIONS incorporated herein.** These documents can be accessed from the Ariba Sourcing Tool.

**Failure to execute/sign proposal prior to submittal may render proposal invalid and it MAY BE REJECTED. Late proposals shall not be accepted.**

|  |  |  |  |
| --- | --- | --- | --- |
| COMPLETE/FORMAL NAME OF VENDOR: | | | |
| STREET ADDRESS: | | P.O. BOX: | ZIP: |
| CITY & STATE & ZIP: | | TELEPHONE NUMBER: | TOLL FREE TEL. NO: |
| PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE (SEE INSTRUCTIONS TO VENDORS ITEM #21): | | | |
| PRINT NAME & TITLE OF PERSON SIGNING ON BEHALF OF VENDOR: | | FAX NUMBER: | |
| **VENDOR’S AUTHORIZED SIGNATURE\***: | **DATE:** | EMAIL: | |

**VALIDITY PERIOD**

Offer shall be valid for at least one hundred eighty (180) days from date of bid opening, or if extended by mutual agreement of the parties in writing. Any withdrawal of this offer shall be made in writing, effective upon receipt by the agency issuing this RFP.

**ACCEPTANCE OF PROPOSAL**

If your proposal is accepted, all provisions of this RFP, along with the written results of any negotiations, shall constitute the written agreement between the parties (“Contract”). The NORTH CAROLINA GENERAL TERMS AND CONDITIONS are incorporated herein and shall apply. Depending upon the Goods or Services being offered, other terms and conditions may apply, as mutually agreed.

|  |
| --- |
| **FOR STATE USE ONLY:** Offer accepted and Contract awarded this\_\_\_\_\_\_\_\_ day of \_\_\_\_\_\_\_\_\_\_, 20\_\_\_\_, as indicated on  The attached certification, by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.  **(Authorized Representative of DMHDDSUS)** |

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# PURPOSE AND BACKGROUND

The purpose of this RFP is to solicit proposals from Vendors located in North Carolina to assist the North Carolina Department of Health and Human Services (NC DHHS), Division of Mental Health, Developmental Disabilities and Substance Use Services (DMHDDSUS) in the development and facilitation of a state-wide, disability-wide, and all-inclusive Person-Centered Practice Collaborative (“Collaborative”) that is based on utilization of the [NC Person-Centered Planning Guidance Document](https://www.ncdhhs.gov/nc-pcp-guidance-document) and [Person-Centered Plan/Crisis Plan](https://www.ncdhhs.gov/pcp-template-blank). DMHDDSUS envisions a recovery-oriented, person-first, and strengths-based State-Wide Person-Centered Practice Collaborative. Only Vendors headquartered in North Carolina will be considered for award.

NC DMHDDSUS has updated the way Person-Centered Plans are created, making them more individualized and recovery oriented. The Person-Centered Plan incorporates the new Guidance Document and its accompanying template. Since the implementation of the 2023 Person-Centered Planning training, there has been growing need to bring providers together to enhance the Person-Centered Planning process and uphold the principles of person-centeredness.

Person-centered planning is defined as “a highly individual comprehensive approach to assessment and services”. Rather than focusing solely on symptom relief, person-centered planning’s unifying vision is for providers to collaborate with individuals in developing personalized plans that identify their life goals and address potential barriers. Although the process follows the usual service planning steps - assessment, planning, evaluation - it is guided by the key principles of ongoing use of strengths-based assessments, adherence to person-centered values, recognition of diverse interventions and contributors (including family and natural supports), an emphasis on community inclusion, respect for individuals’ right to take risks and experience failure and demonstrating a commitment to both outcomes and process evaluation.

The Collaborative will strengthen the service providers’ skills in attaining and incorporating individualized goals documented in the Person-Centered Plan and promote better outcomes for individuals receiving services, with particular focus on individuals with Serious Mental Illness (SMI)/Seriously Emotionally Disturbed (SED). The Collaborative will promote Person-Centered Champions to help lead in the state-wide efforts.

The intent of this solicitation is to award an Agency Specific Contract.

* 1. CONTRACT TERM

The Contract shall have an initial term of one (1) year, beginning on the date of final Contract execution (the “Effective Date”). The Vendor shall begin work under the Contract within fifteen (15) business days of the Effective Date.

At the end of the Contract’s initial term, the State shall have the option, in its sole discretion, to renew the Contract on the same terms and conditions for up to two (2) additional one-year terms. The State will give the Vendor written notice of its intent to exercise each option no later than thirty (30) days before the end of the Contract’s then-current term. In addition to any optional renewal terms, and with the Vendor’s concurrence, the State reserves the right to extend the Contract after the last active term.

Proposals shall be submitted in accordance with the terms and conditions of this RFP and any addenda issued hereto.

# GENERAL INFORMATION

## REQUEST FOR PROPOSAL DOCUMENT

This RFP is comprised of the base RFP document, any attachments, and any addenda released before Contract award, which are incorporated herein by reference.

## E-PROCUREMENT FEE

**ATTENTION:** **This is an NC eProcurement solicitation facilitated by the Ariba Network. The E-Procurement fee may apply to this solicitation. See the paragraph entitled ELECTRONIC PROCUREMENT of the North Carolina General Terms and Conditions.**

General information on the E-Procurement Services can be found at: <http://eprocurement.nc.gov/>.

**What is the Ariba Network?**

The Ariba Network is a web-based platform that serves as a connection point for buyers and vendors. Vendors can log in to the Ariba Network to view purchase orders, respond to electronic requests for quotes, participate in Sourcing Events, and collaborate with buyers on contract documents.

For training on how to use the Sourcing Tool to view solicitations, submit questions, develop responses, upload documents, and submit offers to the State, Vendors should go to the following site:

http://eprocurement.nc.gov/training/vendor-training.

## NOTICE TO VENDORS REGARDING RFP TERMS AND CONDITIONS

It shall be the Vendor’s responsibility to read the Instructions to Vendors, the North Carolina General Terms and Conditions, all relevant exhibits and attachments, and any other components made a part of this RFP and comply with all requirements and specifications herein. Vendors are also responsible for obtaining and complying with all Addenda and other changes that may be issued in connection with this RFP.

If Vendors have questions, issues, regarding any component of this RFP, those must be submitted as questions in accordance with the instructions in the PROPOSAL QUESTIONS Section. If the State determines that any changes will be made as a result of the questions asked, then such decisions will be communicated in the form of an RFP addendum. The State may also elect to leave open the possibility for later negotiation of specific provisions of the Contract that have been addressed during the question-and-answer period, prior to contract award.

Other than through the process of negotiation under 01 NCAC 05B.0503, the State rejects and will not be required to evaluate or consider any additional or modified terms and conditions submitted with Vendor’s proposal or otherwise. This applies to any language appearing in or attached to the document as part of the Vendor’s proposal that purports to vary any terms and conditions or Vendors’ instructions herein or to render the proposal non-binding or subject to further negotiation. Vendor’s proposal shall constitute a firm offer that shall be held open for the period required herein (“Validity Period” above).

**The State may exercise in its discretion to consider Vendor proposed modifications. By execution and delivery of this RFP Response, the Vendor agrees that any additional or modified terms and conditions, whether submitted purposely or inadvertently, shall have no force or effect, and will be disregarded unless expressly agreed upon through negotiations and incorporated by way of a Best and Final Offer (BAFO). Noncompliance with, or any attempt to alter or delete, this paragraph shall constitute sufficient grounds to reject Vendor’s proposal as nonresponsive.**

## RFP SCHEDULE

The table below shows the *intended* schedule for this RFP. The State will make every effort to adhere to this schedule.

|  |  |  |
| --- | --- | --- |
| **Event** | **Responsibility** | **Date and Time** |
| Issue RFP | State | March 19, 2025 |
| Submit Written Questions | Vendor | March 25, 2025 |
| Provide Response to Questions | State | March 28, 2025 |
| Submit Proposals | Vendor | April 8, 2025 @ 2pm ET |
| Public Bid Opening | State | April 8, 2025 @ 2pm ET **Microsoft Teams** [Need help?](https://aka.ms/JoinTeamsMeeting?omkt=en-US)  [**Join the meeting now**](https://teams.microsoft.com/l/meetup-join/19%3ameeting_NzRiZTRlMzEtZDczOC00YjdhLTgzYzAtM2I3MDBiYTFlOWJj%40thread.v2/0?context=%7b%22Tid%22%3a%227a7681dc-b9d0-449a-85c3-ecc26cd7ed19%22%2c%22Oid%22%3a%22eeb9d612-d353-4930-84aa-9b3ed6bec81b%22%7d)  Meeting ID: 227 214 267 218  Passcode: 2hA2KN2C |
| Evaluate Proposals | State | May 20, 2025 |
| Contract Award | State | May 27, 2025 |

## PROPOSAL QUESTIONS

Upon review of the RFP documents, Vendors may have questions to clarify or interpret the RFP in order to submit the best proposal possible. To accommodate the Proposal Questions process, Vendors shall submit any such questions by the “Submit Written Questions” date and time provided in the RFP SCHEDULE Section above, unless modified by Addendum.

Questions related to the content of the solicitation, or the procurement process should be directed to the person on the title page of this document via the Sourcing Tool's message board by the date and time specified in the RFP SCHEDULE Section of this RFP. Vendors will enter “**RFP # 30-25190-DMH – Questions**” as the subject of the message. Question submittals should include a reference to the applicable RFP section. This is the only manner in which questions will be received.

Questions or issues related to using the Sourcing Tool itself can be directed to the North Carolina eProcurement Help Desk at 888-211-7440, Option 2. Help Desk representatives are available Monday through Friday from 7:30 AM ET to 5:00 PM ET.

Questions received prior to the submission deadline date, the State’s response, and any additional terms deemed necessary by the State will be posted in the Sourcing Tool in the form of an addendum and shall become an Addendum to this RFP. No information, instruction or advice provided orally or informally by any State personnel, whether made in response to a question or otherwise in connection with this RFP, shall be considered authoritative or binding. Vendors shall rely *only* on written material contained in the RFP and an addendum to this RFP.

## PROPOSAL SUBMITTAL

**IMPORTANT NOTE:** **This is an absolute requirement.** Late bids, regardless of cause, will not be opened or considered, and will be automatically disqualified from further consideration. Vendor shall bear the sole risk of late submission due to unintended or unanticipated delay. It is the Vendor’s sole responsibility to ensure its proposal has been received as described in this RFP by the specified time and date of opening. Failure to submit a proposal in strict accordance with instructions provided shall constitute sufficient cause to reject a Vendor’s proposal(s). Solicitation responses are subject to Sealed Bidding requirements.

Vendor’s proposals for this procurement must be submitted through the Sourcing Tool. For training on how to use the Sourcing Tool to view solicitations, submit questions, develop responses, upload documents, and submit offers to the State, Vendors should go to the following site: <https://eprocurement.nc.gov/training/vendor-training>

Questions or issues related to using the Sourcing Tool itself can be directed to the North Carolina eProcurement Help Desk at 888-211-7440, Option 2. Help Desk representatives are available Monday through Friday from 7:30 AM EST to 5:00 PM EST.

Tips for Using the Sourcing Tool

1. Vendors should review available training and confirm that they are able to access the Sourcing Event, enter responses, and upload files well in advance of the date and time response are due to allow sufficient time to seek assistance from the North Carolina eProcurement Help Desk.
2. Vendors may submit their responses early to make sure there are no issues, and then submit a revised response any time prior to the response due date and time. The State will only review the most recent response.
3. Vendors should respond to all relevant sections of the Sourcing Event. Certain questions or items are required in order to submit a response and are denoted with an asterisk. The Sourcing Tool will not allow a response to be submitted unless all required items are completed. The Sourcing Tool will provide error messages to help identify any required information that is missing when response is submitted.
4. Simply saving your response in the Sourcing Tool is not the same as submitting your response to the State. Vendors should make sure they complete the submission process and receive a message that their response was successfully submitted.
5. **Only Proposals submitted through the Content Section of the Ariba Sourcing Event will be considered. Proposals submitted through the Message Board will not be accepted or considered for award.**

If confidential and proprietary information is included in the proposal, also submit one (1) signed, REDACTED copy of the proposal. Such information may include trade secrets defined by N.C. Gen. Stat. § 66-152 and other information exempted from the Public Records Act pursuant to N.C. Gen. Stat. §132- 1.2. Vendor may designate information, Products, Services or appropriate portions of its response as confidential, consistent with and to the extent permitted under the statutes and rules set forth above. By so redacting any page, or portion of a page, the Vendor warrants that it has formed a good faith opinion, having received such necessary or proper review by counsel and other knowledgeable advisors, that the portions determined to be confidential and proprietary and redacted as such, meet the requirements of the Rules and Statutes set forth above. However, under no circumstances shall price information be designated as confidential.

If the Vendor does not provide a redacted version of the proposal with its proposal submission, the Department may release an unredacted version if a record request is received.

## PROPOSAL CONTENTS

Vendors shall provide responses to all questions and complete all attachments for this RFP that require the Vendor to provide information and upload them to the Sourcing Event in the Sourcing Tool. Vendor may not be able to submit its response in the Sourcing Tool unless all required items are addressed. Vendors shall provide authorized signatures where requested. Failure to provide all required items, or Vendor’s submission of incomplete items, may result in the State rejecting Vendor’s proposal, in the State’s sole discretion.

Vendor shall include the following items and attachments in the Sourcing Tool:

1. Cover Letter, which must contain the following: (i)a statement that confirms that the proposer has read the RFP in its entirety, including all links, and all Addenda released in conjunction with the RFP; (ii) a statement that the Vendor agrees to perform in accordance with the scope of work, requirements, and specifications contained herein; and (iii) Vendor’s agreement to comply with all instructions, terms and conditions, and attachments.
2. Title Page: Include the company name, address, phone number and authorized representative along with the Proposal Number.
3. Completed and signed version of all EXECUTION PAGES, along with the body of the RFP.
4. Signed receipt pages of any addenda released in conjunction with this RFP, if required to be returned.
5. Vendor’s Proposal addressing all Specifications of this RFP. *[Indicate relative section references as a guide to responding to sections requiring additional responses outside of the solicitation document. If not required, delete.]*
6. Completed version of ATTACHMENT A: PRICING
7. Completed and signed version of ATTACHMENT D: HUB SUPPLEMENTAL VENDOR INFORMATION
8. Completed and signed version of ATTACHMENT E: CUSTOMER REFERENCE FORM
9. Completed and signed version of ATTACHMENT F: LOCATION OF WORKERS UTILIZED BY VENDOR
10. Completed and signed version of ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION
11. Completed and signed version of CERTIFICATION FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS and OMB STANDARD FORM LLL

## ALTERNATE PROPOSALS

Unless provided otherwise in this RFP, Vendor may submit alternate proposals for comparable Goods, various methods or levels of Service(s), or that propose different options. Alternate proposals must specifically identify the RFP requirements and advantage(s) addressed by the alternate proposal. Each proposal must be for a specific set of Goods and Services and must include specific pricing. Each proposal must be complete and independent of other proposals offered. If a Vendor chooses to respond with various offerings, Vendor shall follow the specific instructions for uploading Alternate Proposals in the Sourcing Tool.

## DEFINITIONS, ACRONYMS, AND ABBREVIATIONS

Relevant definitions for this RFP are provided in 01 NCAC 05A .0112 and in the Instructions to Vendors found in the Sourcing Tool, which are incorporated herein by this reference.

The following definitions, acronyms, and abbreviations are also relevant to this RFP:

|  |  |
| --- | --- |
| Acronym/Definition | Meaning |
| CEU | Continuing Education Unit |
| DMHDDSUS | Division of Mental Health, Developmental Disabilities and Substance Use Services |
| Lived experience | The knowledge and understanding that comes from personal experience of a social, health, or public health issue. |
| NC DHHS | North Carolina Department of Health and Human Services |
| Person-Centered Champions | A person who advocates for and supports person-centered care including the ability to understand culturally respectful care and strategies to address health care disparities. |
| Person-Centered Planning | A highly individual comprehensive approach to assessment and services. |
| SED | Seriously Emotionally Disturbed |
| SMI | Serious Mental Illness |
| Tailored Plans | NC Medicaid Managed Care health plan which offers physical health, pharmacy (prescriptions), care management and behavioral health services. |
| TCL | Transition to Community Living |

# METHOD OF AWARD AND PROPOSAL EVALUATION PROCESS

## METHOD OF AWARD

North Carolina G.S. 143-52 provides a general list of criteria the State shall use to award contracts, as supplemented by the additional criteria herein. The Goods or Services being procured shall dictate the application and order of criteria; however, all award decisions shall be in the State’s best interest. All qualified proposals will be evaluated, and awards will be made to the Vendor(s) meeting the specific RFP Specifications and achieving the highest and best final evaluation, based on the criteria described below.

While the intent of this RFP is to award a Contract to a single Vendor, the State reserves the right to make separate awards to different Vendors for one or more line-items, to not award one or more line-items or to cancel this RFP in its entirety without awarding a Contract, if it is considered to be most advantageous to the State to do so.

The State reserves the right to waive any minor informality or technicality in proposals received.

## CONFIDENTIALITY AND PROHIBITED COMMUNICATIONS DURING EVALUATION

While this RFP is under evaluation, the responding Vendor, including any subcontractors and suppliers, is prohibited from engaging in conversations intended to influence the outcome of the evaluation. See Paragraph 29 of the Instructions to Vendors entitled COMMUNICTIONS BY VENDORS.

Each Vendor submitting a proposal to this RFP, including its employees, agents, subcontractors, suppliers, subsidiaries and affiliates, is prohibited from having any communications with any person inside or outside the using agency; issuing agency; other government agency office or body (including the purchaser named above, any department secretary, agency head, members of the General Assembly and Governor’s office); or private entity, if the communication refers to the content of Vendor’s proposal or qualifications, the content of another Vendor’s proposal, another Vendor’s qualifications or ability to perform a resulting contract, and/or the transmittal of any other communication of information that could be reasonably considered to have the effect of directly or indirectly influencing the evaluation of proposals, the award of a contract, or both.

Any Vendor not in compliance with this provision shall be disqualified from evaluation and award. A Vendor’s proposal may be disqualified if its subcontractor and/or supplier engage in any of the foregoing communications during the time that the procurement is active (*i.e.*, the issuance date of the procurement until the date of contract award or cancellation of the procurement). Only those discussions, communications or transmittals of information authorized or initiated by the issuing agency for this RFP or inquiries directed to the purchaser named in this RFP regarding requirements of the RFP (prior to proposal submission) or the status of the award (after submission) are excepted from this provision.

## PROPOSAL EVALUATION PROCESS

Only responsive submissions will be evaluated.

**The State will conduct a One-Step evaluation of Proposals:**

Proposals will be received according to the method stated in the Proposal Submittal Section above.

All proposals must be received by the issuing agency not later than the date and time specified in the RFP SCHEDULE Section above, unless modified by Addendum. Vendors are cautioned that this is a request for offers, not an offer or request to contract, and the State reserves the unqualified right to reject any and all offers at any time if such rejection is deemed to be in the best interest of the State.

At the date and time provided in the RFP SCHEDULE Section above, unless modified by Addendum, the proposal from each responding Vendor will be opened publicly and all offers (except those that have been previously withdrawn, or voided bids) will be tabulated. The tabulation shall be made public at the time it is created. When negotiations after receipt of bids are authorized pursuant to G.S. 143-49 and 01 NCAC 05B.0503, only the names of offerors and the Goods and Services offered shall be tabulated at the time of opening. If negotiation is anticipated, cost and price shall become available for public inspection at the time of the award. Interested parties are cautioned that these costs and their components are subject to further evaluation for completeness and correctness and therefore may not be an exact indicator of a Vendor’s pricing position.

At their option, the evaluators may request oral presentations or discussions with any or all Vendors for clarification or to amplify the materials presented in any part of the proposal. Vendors are cautioned, however, that the evaluators are not required to request presentations or other clarification—and often do not. Therefore, all proposals should be complete and reflect the most favorable terms available from the Vendor.

Upon completion of the evaluation process, the State will make award(s) based on the evaluation and post the award(s) to *the electronic Vendor Portal (eVP),* [*https://evp.nc.gov*](https://evp.nc.gov)*,*  under the RFP number for this solicitation. Award of a Contract to one Vendor does not mean that the other proposals lacked merit, but that, all factors considered, the selected proposal was deemed most advantageous and represented the best value to the State.

The State reserves the right to negotiate with one or more vendors, or to reject all original offers and negotiate with one or more sources of supply that may be capable of satisfying the requirement, and in either case to require Vendor to submit a Best and Final Offer (BAFO) based on discussions and negotiations with the State.

## EVALUATION CRITERIA

In addition to the general criteria in G.S. 143-52 which may or may not be relevant to this RFP, all qualified proposals will be evaluated, and award made based on considering the following criteria, to result in an award most advantageous to the State:

**BEST VALUE:** "Best Value" procurement methods are authorized by N.C.G.S. §§143-135.9 and 143B-1350(h).  The award decision is made based on multiple factors, including: total cost of ownership, meaning the cost of acquiring, operating, maintaining, and supporting a product or service over its projected lifetime; the evaluated technical merit of the Vendor's offer; the Vendor's past performance; and the evaluated probability of performing the specifications stated in the solicitation on time, with high quality, and in a manner that accomplishes the stated business objectives and maintains industry standards compliance.  The intent of "Best Value" procurement is to enable Vendors to offer and the Agency to select the most appropriate solution to meet the business objectives defined in the solicitation and to keep all parties focused on the desired outcome of a procurement.

A ranking method of source selection will be utilized in this procurement using evaluation criteria listed in order of importance in the Evaluation Criteria section below to allow the State to award this RFP to the Vendor(s) providing the Best Value and recognizing that Best Value may result in award other than the lowest price or highest technically qualified offer.  By using this method, the overall ranking may be adjusted up or down when considered with, or traded-off against, other non-price factors.

**EVALUTION METHOD:**  Narrative and by consensus of the evaluating committee, explaining the strengths and weaknesses of each proposal and why the recommended awardee(s) provide the best value to the State.

All qualified proposals will be evaluated, and award made based on considering the following criteria listed in descending order of importance, to result in an award most advantageous to the State:

1. Vendor Technical Approach (Section 5.5 Technical Approach)
2. Vendor Qualifications and Organizational Capacity (Section 5.4 Project Organization)
3. Vendor Experience (Section 4.5 Vendor Experience and Section 4.6 References)
4. Pricing (Section 4.1 and Attachment A)

## PERFORMANCE OUTSIDE THE UNITED STATES

Vendor shall complete ATTACHMENT F: LOCATION OF WORKERS UTILIZED BY VENDOR. In addition to any other evaluation criteria identified in this RFP, the State may also consider, for purposes of evaluating proposed or actual contract performance outside of the United States, how that performance may affect the following factors to ensure that any award will be in the best interest of the State:

1. Total cost to the State
2. Level of quality provided by the Vendor
3. Process and performance capability across multiple jurisdictions
4. Protection of the State’s information and intellectual property
5. Availability of pertinent skills
6. Ability to understand the State’s business requirements and internal operational culture
7. Particular risk factors such as the security of the State’s information technology
8. Relations with citizens and employees
9. Contract enforcement jurisdictional issues

## INTERPRETATION OF TERMS AND PHRASES

This RFP serves two functions: (1) to advise potential Vendors of the parameters of the solution being sought by the State; and (2) to provide (together with other specified documents) the terms of the Contract resulting from this procurement. The use of phrases such as “shall,” “must,” and “requirements” are intended to create enforceable contract conditions. In determining whether proposals should be evaluated or rejected, the State will take into consideration the degree to which Vendors have proposed or failed to propose solutions that will satisfy the State’s needs as described in the RFP. Except as specifically stated in the RFP, no one requirement shall automatically disqualify a Vendor from consideration. However, failure to comply with any single requirement may result in the State exercising its discretion to reject a proposal in its entirety.

# **REQUIREMENTS**

This Section lists the requirements related to this RFP. By submitting a proposal, the Vendor agrees to meet all stated requirements in this Section as well as any other specifications, requirements, and terms and conditions stated in this RFP. If a Vendor is unclear about a requirement or specification, or believes a change to a requirement would allow for the State to receive a better proposal, the Vendor is urged to submit these items in the form of a question during the question-and-answer period in accordance with the Proposal Questions Section above.

* 1. **PRICING**

Proposal price shall constitute the total cost to the State for complete performance in accordance with the requirements and specifications herein, including all applicable charges for handling, transportation, administrative and other similar fees. Complete ATTACHMENT A: PRICING FORM and upload in the Sourcing Tool. The pricing provided in ATTACHMENT A, or resulting from any negotiations, is incorporated herein and shall become part of any resulting Contract.

* 1. **INVOICES**

Vendor shall invoice the Purchasing Agency. The standard format for invoicing shall be Single Invoices meaning that the Vendor shall provide the Purchasing Agency with an invoice for each order. Invoices shall include detailed information to allow Purchasing Agency to verify pricing at point of receipt matches the correct price from the original date of order. The following fields shall be included on all invoices, as relevant:

Vendor’s Billing Address, Customer Account Number, NC Contract Number, Order Date, Buyer’s Order Number, Manufacturer Part Numbers, Vendor Part Numbers, Item Descriptions, Price, Quantity, and Unit of Measure.

**INVOICES MAY NOT BE PAID UNTIL AN INSPECTION HAS OCCURRED AND THE GOODS OR SERVICES ACCEPTED.**

* 1. **FINANCIAL STABILITY**

As a condition of contract award, the Vendor must certify that it has the financial capacity to perform and to continue to perform its obligations under the Contract; that Vendor has no constructive or actual knowledge of an actual or potential legal proceeding being brought against Vendor that could materially adversely affect performance of this Contract; and that entering into this Contract is not prohibited by any contract, or order by any court of competent jurisdiction.

Each Vendor shall certify it is financially stable by completing ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION. The State is requiring this certification to minimize potential issues from contracting with a Vendor that is financially unstable. From the date of the Certification to the expiration of the Contract, the Vendor shall notify the State within thirty (30) days of any occurrence or condition that materially alters the truth of any statement made in this Certification. The Contract Manager may require annual recertification of the Vendor’s financial stability.

* 1. **HUB PARTICIPATION**

Pursuant to North Carolina General Statute G.S. 143-48, it is State policy to encourage and promote the use of small, minority, physically handicapped, and women contractors in purchasing Goods and Services. As such, this RFP will serve to identify those Vendors that are minority owned or have a strategic plan to support the State’s Historically Underutilized Business program by meeting or exceeding the goal of 10% utilization of diverse firms as 1st or 2nd tier subcontractors. Vendor shall complete ATTACHMENT D: HUB SUPPLEMENTAL VENDOR INFORMATION.

* 1. **VENDOR EXPERIENCE**

In its Proposal, Vendor shall demonstrate experience with public and/or private sector clients with similar or greater size and complexity to the State. Vendor shall provide information as to the qualifications and experience of all executive, managerial, legal, and professional personnel to be assigned to this project, including resumes citing experience with similar projects and the responsibilities to be assigned to each person.

Vendor shall demonstrate the following:

1. Knowledge and experience with Person-Centered Planning with all disability populations.
2. Experience facilitating state-wide learning collaboratives.
3. Involvement in The Learning Community for Person-Centered Practices and a mentor/ trainer in Person-Centered Thinking and Planning.
4. Working knowledge of the Transition to Community Living (TCL) settlement from the Department of Justice.
5. Familiarity with the new NC Person-Centered Plan template and the North Carolina Person-Centered Guidance Document.
6. Headquartered in North Carolina and a subject matter expert with knowledge of North Carolina’s mental health system and background.
   1. **REFERENCES**

Vendor shall upload to the Sourcing Tool at least three (3) references, using ATTACHMENT E: CUSTOMER REFERENCE FORM, for which it has provided Services of similar size and scope to those proposed herein. The State may contact these users to determine whether the Services provided are substantially similar in scope to those proposed herein and whether Vendor’s performance has been satisfactory. The information obtained may be considered in the evaluation of the Proposal.

* 1. **BACKGROUND CHECKS**

Any personnel or agent of Vendor performing Services under any Contract arising from this RFP may be required to undergo a background check at the expense of the Vendor, if so requested by the State.

* 1. **PERSONNEL**

Vendor warrants that qualified personnel shall provide Services under this Contract in a professional manner. “Professional manner” means that the personnel performing the Services will possess the skill and competence consistent with the prevailing business standards in the industry. Vendor will serve as the prime contractor under this Contract and shall be responsible for the performance and payment of all subcontractor(s) that may be approved by the State. Names of any third-party Vendors or subcontractors of Vendor may appear for purposes of convenience in Contract documents; and shall not limit Vendor’s obligations hereunder. Vendor will retain executive representation for functional and technical expertise as needed in order to incorporate any work by third party subcontractor(s).

Should the Vendor’s proposal result in an award, the Vendor shall be required to agree that it will not substitute key personnel assigned to the performance of the Contract without prior written approval by the Contract Lead. Vendor shall further agree that it will notify the Contract Lead of any desired substitution, including the name(s) and references of Vendor’s recommended substitute personnel. The State will approve or disapprove the requested substitution in a timely manner. The State may, in its sole discretion, terminate the Services of any person providing Services under this Contract. Upon such termination, the State may request acceptable substitute personnel or terminate the contract Services provided by such personnel.

* 1. **VENDOR’S REPRESENTATIONS**

If Vendor’s Proposal results in an award, Vendor agrees that it will not enter any agreement with a third party that may abridge any rights of the State under the Contract. If any Services, deliverables, functions, or responsibilities not specifically described in this solicitation are required for Vendor’s proper performance, provision and delivery of the Service and deliverables under a resulting Contract, or are an inherent part of or necessary sub-task included within such Service, they will be deemed to be implied by and included within the scope of the Contract to the same extent and in the same manner as if specifically described in the Contract. Unless otherwise expressly provided herein, Vendor will furnish all of its own necessary management, supervision, labor, facilities, furniture, computer and telecom­munications equipment, software, supplies and materials necessary for the Vendor to provide and deliver the Services and/or other Deliverables.

* 1. **AGENCY INSURANCE REQUIREMENTS MODIFICATION**

A. Default Insurance Coverage from the General Terms and Conditions applicable to this Solicitation:

Small Purchases

Contract value in excess of the Small Purchase threshold, but up to $1,000,000.00

Contract value in excess of $1,000,000.00

* 1. **LOBBYING ACTIVITY CERTIFICATION FOR FEDERAL GRANTS**

Federal law prohibits recipients of federal funds, whether through grants, contracts, or cooperative agreements, from using those funds to influence or attempt to influence (lobby) a federal official in connection with obtaining, extending, or modifying any federal contract, grant, loan, or cooperative agreement. Further, federal law requires that applicants for federal funds certify:

* that they abide by the above restriction;
* that they disclose any permissible (non-federal) paid lobbying on the Federal Awards being applied for; and
* that such certification requirements will also be included in any subawards meeting the applicable thresholds.

Vendors must complete and submit the CERTIFICATION FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS and the OMB STANDARD FORM LLL when responding to this solicitation.

1. **SPECIFICATIONS AND SCOPE OF WORK**
2. **GENERAL**

The Vendor will work to assist DMHDDSUS with ensuring that the implementation of the new state-wide Person-Centered Practice Collaborative will incorporate the new changes that were made to the Person-Centered Planning documents, while focusing on recovery-oriented language, person-centered thinking, self-determination, and truly focus on how to develop individualized plans based on the individuals’ stated goals and needs. The Collaborative work will include training development, facilitation for service providers and post training facilitation.

The Person-Centered Practice Collaborative service is offered to be inclusive for all disability groups, including but not limited to, SMI and SED. Over the course of the 12-month contract period, the Vendor shall develop, facilitate and execute four (4) remote and one (1) in-person Person-Centered Practice Collaborative meetings to engage and advance a diverse stakeholder audience in the Person-Centered Planning process and uphold the principles of person-centeredness across populations and levels of care.

The Person-Centered Practice Collaborative will include persons that have lived experience, peer organizations, provider organizations, Tailored Plan quality monitoring reps and other state leadership reps, and leadership from provider organizations. These will be aimed at providers, Tailored Plans and service recipients to discuss efforts to incorporate a recovery-focused approach within Person-Centered Planning development and to help identify priority areas for training and systemic intervention.

The Vendor shall collect post-training surveys and an annual survey to assist DMHDDSUS to inform ongoing modifications and determine if it is producing the intended improvements in person-centeredness. The Vendor shall provide quarterly progress reports to DHHS contract manager to inform emerging needs identified to promote alignment in the quality of person-centered planning.

1. **SPECIFICATIONS**

The specific items and any specifications that the Purchasing Agency is seeking are listed below. Items offered by the Vendor must meet or exceed the listed Specifications to be considered for award. Vendor must describe their technical approach for each specification listed in Table 5.2.1.

**Table 5.2.1 Specifications**

|  |  |
| --- | --- |
| **Item #** | **Specifications** |
|  | Describe Vendor’s design of Collaborative structure and process:   1. Describe how Vendor will include co-designers with lived experience. 2. Describe how Vendor will work with the state and Tailored Plans to identify provider participants. 3. Describe Vendor’s design of the invitation/flyer to join the Collaborative and how Vendor will distribute invitation/flyer to providers that develop person-centered plans. 4. Describe how Vendor will provide Continuing Education Units (CEUs) to providers to enhance and engage provider attendance (if applicable). |
|  | Describe Vendor’s design, plan and facilitation of the virtual orientation/kickoff meeting for the Collaborative to introduce the Collaborative process to participants. |
|  | Describe Vendor’s design, plan and facilitation of the bi-monthly Collaborative meetings (one (1) in-person; four (4) virtual). The first virtual meeting will be the orientation/kick-off meeting.   1. Describe how Vendor will develop topics based on areas determined to be needing improvement. 2. Describe how Vendor will include service providers that develop the Person-Centered Plans. 3. Describe how Vendor will address problem areas identified such as:    * 1. Barriers      2. Weak crisis plans      3. Problem areas from review of Person-Centered Plans (How to thread short-term and long-term goals together.)      4. Recovery focused      5. Identify Person-Centered Champions |
|  | Describe how Vendor will implement program evaluation.   1. Describe the development of one (1) post-training survey and one (1) annual survey of participants to evaluate the program effectiveness and attitudes of participants towards the program. Submit survey templates to DMHDDSUS for approval within 30 days of Contract execution.    * 1. Post-training survey to include:         1. Whether participants have gained knowledge in Person-Centered practices         2. How participants will use the knowledge they have gained in their practice         3. Skill development of participants         4. Attitudinal changes toward Person-Centered Planning         5. Suggestions for future topics surrounding Person-Centered Planning         6. Whether the participant facilitates Person-Centered Planning directly with the client receiving services.      2. Annual survey to include:         1. Whether participants have gained knowledge in Person-Centered practices         2. How participants will use the knowledge they have gained in their practice         3. Skill development of participants         4. Attitudinal changes toward Person-Centered Planning         5. Suggestions for improvement to the Collaborative 2. Describe how Vendor will provide post-training survey to Collaborative participants after each meeting. 3. Describe how Vendor will provide annual survey to Collaborative participants no later than two weeks before the end of the 12-month Contract term. |
|  | Describe how Vendor will compile responses received from collaborative post-training and annual surveys and provide report to contract manager. |
|  | Vendor shall respond to requests for information within five (5) business days. |
|  | Vendor shall submit quarterly and year-end progress reports detailing information covering the entire Person-Centered Practice Collaborative. |
|  | Vendor shall participate in communication/meetings (emails, calls, meetings, support for engagement, structure, process) with providers, participants, State staff, Tailored Plans, Subject Matter Experts in Person-Centered Planning, and other stakeholders, as needed. |

1. **TASKS/DELIVERABLES**

Deliverables will be on time and acceptable to DMHDDSUS. All deliverables will become the property of DMHDDSUS during and after the Contract period for all purposes.

* + 1. Attribution

All materials and deliverables completed/submitted by the Vendor shall include the name of the Division as project or initiative sponsor. When possible, the DHHS branding and logo will also be included. In addition, all deliverables and materials produced with Block Grant funding will include a statement identifying the name of the Block Grant. This includes reports, brochures, pamphlets, websites, e­mails, newsletters and any other types of deliverables.

Example: Funding (INSERT specific here such as: for scholarships, etc. or for this project, brochure, program, conference, meeting, outreach, etc.) is wholly or in part provided by the NC Division of Mental Health, Developmental Disabilities & Substance Use Services through the federal Community Mental Health Services Block Grant Fund (CFDA #93.958).

**Table 5.3.2 Deliverables**

|  |  |  |  |
| --- | --- | --- | --- |
| **Deliverable #** | **Specification #** | **Deliverable Description** | **Timeline** |
|  | 1., 2. and 3. | Design, plan and facilitate virtual orientation/kick-off meeting. Provide post-training survey to Collaborative participants within three (3) business days after each meeting. | The orientation/kick-off meeting will be held within 60 days of Contract execution. Post-training survey will be provided within three (3) business days after each meeting. |
|  | 1., 2. and 3. | Design, plan and facilitate one (1) In-person Collaborative meeting. Provide post-training survey to Collaborative participants within three (3) business days after each meeting. | The Collaborative will be held every other month. Post-training survey will be provided within three (3) business days after each meeting. |
|  | 1., 2. and 3. | Design, plan and facilitate three (3) virtual bi-monthly Collaborative meetings. Provide post-training survey to Collaborative participants within three (3) business days after each meeting. | The Collaborative will be held every other month. Post-training survey will be provided within three (3) business days after each meeting. |
|  | 4. | Develop one (1) post-training survey and one (1) annual survey of participants. Submit survey templates to DMHDDSUS for approval within 30 days of Contract execution. | Submit survey templates within 30 days of Contract execution. |
|  | 5. and 7. | Submit quarterly progress reports detailing information covering the entire Person-Centered Practice Collaborative. Reports will include:   1. Agenda and topics covered in each Collaborative meeting 2. Number of participants in each Collaborative meeting 3. Compile responses received from Collaborative post-training surveys for each Collaborative meeting held during the quarter. 4. Possible topics for next Collaborative meetings. | Quarterly reports will be due the 15th day of the month after each three-month period. |
|  | 5. and 7. | Submit year-end progress report detailing information covering the entire Person-Centered Practice Collaborative. Reports will include:   1. Agenda and topics covered in each Collaborative meeting 2. Number of participants in each Collaborative meeting 3. Compile responses received from Collaborative post-training surveys for each Collaborative meeting held during the contract period. | Year-end progress report will be due 15 days after the end of the 12-month Contract period. |

1. **PROJECT ORGANIZATION**

Vendor shall describe the organizational and operational structure it proposes to utilize for the work described in this RFP and identify the responsibilities to be assigned to each person Vendor proposes to staff the work.

1. **TECHNICAL APPROACH**

Vendor’s proposal shall include, in narrative, outline, and/or graph form the Vendor's approach to accomplishing the tasks outlined in the Scope of Work section of this RFP. A description of each task and deliverable and the schedule for accomplishing each shall be included.

# **CONTRACT ADMINISTRATION**

All Contract Administration requirements are conditioned on an award resulting from this solicitation. This information is provided for the Vendor’s planning purposes.

5. 1. CONTRACT MANAGER AND CUSTOMER SERVICE

The Vendor shall be required to designate and make available to the State a contract manager. The contract manager shall be the State’s point of contact for Contract related issues and issues concerning performance, progress review, scheduling, and service.

|  |  |
| --- | --- |
| **Contract Manager Point of Contact** | |
| Name: |  |
| Office Phone #: |  |
| Mobile Phone #: |  |
| Email: |  |

* 1. POST AWARD PROJECT REVIEW MEETINGS

The Vendor, at the request of the State, shall be required to meet periodically with the State for Project Review meetings. The purpose of these meetings will be to review project progress reports, discuss Vendor and State performance, address outstanding issues, review problem resolution, provide direction, evaluate continuous improvement and cost saving ideas, and discuss any other pertinent topics.

* 1. CONTINUOUS IMPROVEMENT

The State encourages the Vendor to identify opportunities to reduce the total cost the State. A continuous improvement effort consists of various ways to enhance business efficiencies as performance progresses.

* 1. QUARTERLY PROGRESS REPORTS

The Vendor shall be required to provide Progress Reports to the designated Contract Lead on a quarterly basis and a year-end report at the end of the Contract term. These reports shall include information covering the entire Person-Centered Practice Collaborative.

These reports shall be well organized and easy to read. The Vendor shall submit these reports electronically using the format required by the Purchasing Agency. Quarterly reports will be due the 15th day of the month after each three-month period. The year-end report will be due 15 days after the end of the Contract period.

* 1. ACCEPTANCE OF WORK

Performance of the work and/or delivery of Goods shall be conducted and completed at least in accordance with the Contract requirements and recognized and customarily accepted industry practices. Performance shall be considered complete when the Services or Goods are approved as acceptable by the Contract Administrator.

The State shall have the obligation to notify Vendor, in writing ten (10) calendar days following completion of such work or delivery of a deliverable described in the Contract that it is not acceptable. The notice shall specify in reasonable detail the reason(s) it is unacceptable. Acceptance by the State shall not be unreasonably withheld; but may be conditioned or delayed as required for reasonable review, evaluation, installation, or testing, as applicable to the work or deliverable. Final acceptance is expressly conditioned upon completion of all applicable assessment procedures. Should the work or deliverables fail to meet any specifications, acceptance criteria or otherwise fail to conform to the Contract, the State may exercise any and all rights hereunder, including, for Goods deliverables, such rights provided by the Uniform Commercial Code, as adopted in North Carolina.

* 1. TRANSITION ASSISTANCE

If a Contract results from this solicitation, and the Contract is not renewed at the end of the last active term, or is canceled prior to its expiration, for any reason, Vendor shall provide transition assistance to the State, at the option of the State, for up to six (6) months to allow for the expired or canceled portion of the Services to continue without interruption or adverse effect, and to facilitate the orderly transfer of such Services to the State or its designees. If the State exercises this option, the Parties agree that such transition assistance shall be governed by the terms and conditions of the Contract (notwithstanding this expiration or cancellation), except for those Contract terms or conditions that do not reasonably apply to such transition assistance. The State shall agree to pay Vendor for any resources utilized in performing such transition assistance at the most current rates provided by the Contract for performance of the Services or other resources utilized.

* 1. DISPUTE RESOLUTION

During the performance of the Contract, the parties agree that it is in their mutual interest to resolve disputes informally. Any claims by the Vendor shall be submitted in writing to the State’s Contract Manager for resolution. Any claims by the State shall be submitted in writing to the Vendor’s Project Manager for resolution. The Parties shall agree to negotiate in good faith and use all reasonable efforts to resolve such dispute(s).

During the time the Parties are attempting to resolve any dispute, each shall proceed diligently to perform their respective duties and responsibilities under this Contract. The Parties will agree on a reasonable amount of time to resolve a dispute. If a dispute cannot be resolved between the Parties within the agreed upon period, either Party may elect to exercise any other remedies available under the Contract, or at law. This provision, when agreed in the Contract, shall not constitute an agreement by either party to mediate or arbitrate any dispute.

* 1. CONTRACT CHANGES

Contract changes, if any, over the life of the Contract shall be implemented by contract amendments agreed to in writing by the State and Vendor. Amendments to the contract can only be through the contract administrator.

* 1. ATTACHMENTS

All attachments to this RFP are the copies found within the Ariba Sourcing Tool, and are incorporated herein, and shall be submitted by responding in the Sourcing Tool.

***THE REMAINDER OF THIS PAGE IS INTENTIONALLY LEFT BLANK***

**ATTACHMENT A: PRICING FORM**

**FURNISH AND DELIVER:**

* + - * 1. All rates must be fully burdened and inclusive of all employment costs and administrative costs.
        2. Hiring fees are not to be included in this pricing table and will not be paid by the State in relation to this Contract.
        3. Vendor travel, if built into deliverable cost, is subject to policies set out in the North Carolina State Budget Manual, Section 5. Travel Policies.

**Table 1: Contract Year 1 Costs**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **ITEM #** | **UNIT** | **QUANTITY** | **DESCRIPTION** | **UNIT PRICE** | **TOTAL COST** |
| **CONTRACT YEAR 1** | | | | | |
|  | Each | 1 | Deliverable #1: Design, plan and facilitate virtual Orientation/Kick-off meeting. Provide post-training survey to Collaborative participants. | $ | $ |
|  | Each | 1 | Deliverable #2: Design, plan and facilitate In-person Collaborative meeting. Provide post-training survey to Collaborative participants. | $ | $ |
|  | Each | 3 | Deliverable #3: Design, plan and facilitate Virtual Collaborative meetings. Provide post-training survey to Collaborative participants. | $ | $ |
|  | Lot | 1 | Deliverable #4: Develop one (1) post-training survey and one (1) annual survey of participants. | $ | $ |
|  | Each | 3 | Deliverable #5: Submit quarterly progress reports detailing information covering the entire Person-Centered Practice Collaborative. | $ | $ |
|  | Each | 1 | Deliverable #6: Submit year-end progress report detailing information covering the entire Person-Centered Practice Collaborative. | $ | $ |
| **NOT TO EXCEED COST FOR CONTRACT YEAR 1** | | | | | $ |

**Table 2: Optional Contract Year 2 Costs**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **ITEM #** | **UNIT** | **QUANTITY** | **DESCRIPTION** | **UNIT PRICE** | **TOTAL COST** |
| **CONTRACT YEAR 2** | | | | | |
|  | Each | 1 | Deliverable #2: Design, plan and facilitate In-person Collaborative meeting. Provide post-training survey to Collaborative participants. | $ | $ |
|  | Each | 4 | Deliverable #3: Design, plan and facilitate Virtual Collaborative meetings. Provide post-training survey to Collaborative participants. | $ | $ |
|  | Lot | 1 | Deliverable #4: Revise/ Update one (1) post-training survey and one (1) annual survey of participants. | $ | $ |
|  | Each | 3 | Deliverable #5: Submit quarterly progress reports detailing information covering the entire Person-Centered Practice Collaborative. | $ | $ |
|  | Each | 1 | Deliverable #6: Submit year-end progress report detailing information covering the entire Person-Centered Practice Collaborative. | $ | $ |
| **NOT-TO-EXCEED COST FOR OPTIONAL CONTRACT YEAR 2** | | | | | $ |

**Table 3: Optional Contract Year 3 Costs**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **ITEM #** | **UNIT** | **QUANTITY** | **DESCRIPTION** | **UNIT PRICE** | **TOTAL COST** |
| **CONTRACT YEAR 3** | | | | | |
|  | Each | 1 | Deliverable #2: Design, plan and facilitate In-person Collaborative meeting. Provide post-training survey to Collaborative participants. | $ | $ |
|  | Each | 4 | Deliverable #3: Design, plan and facilitate Virtual Collaborative meetings. Provide post-training survey to Collaborative participants. | $ | $ |
|  | Lot | 1 | Deliverable #4: Revise/ Update one (1) post-training survey and one (1) annual survey of participants. | $ | $ |
|  | Each | 3 | Deliverable #5: Submit quarterly progress reports detailing information covering the entire Person-Centered Practice Collaborative. | $ | $ |
|  | Each | 1 | Deliverable #6: Submit year-end progress report detailing information covering the entire Person-Centered Practice Collaborative. | $ | $ |
| **NOT-TO-EXCEED COST FOR OPTIONAL CONTRACT YEAR 3** | | | | | $ |