



Request for Proposals (RFP)

SEMI-STATEWIDE EHR SERVICE DESK

Applications due by 5:00 p.m., February 7, 2023



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1 RFP Summary

The California Mental Health Services Authority (CalMHSA), a Joint Powers Authority (JPA), serves California counties and cities as an independent administrative and fiscal intergovernmental structure for jointly developing, funding, and implementing mental health services and educational programs at the state, regional, and local levels. *(See Gov. Code §6500 et seq.)*

To support the Semi-Statewide Electronic Health Record Program (EHR), CalMHSA is seeking through this RFP to procure Service Desk services. This Service Desk will provide Level 1.5 technical support for CalMHSA users accessing the Streamline SmartCare EHR Application during a 12-hour period between 7AM-7PM PST, Monday through Friday.

This RFP is issued for the purpose of soliciting responses from interested entities with the experience and capacity to provide Level 1.5 technical support for CalMHSA Users accessing the Streamline SmartCare EHR Application. This request does not commit CalMHSA to contract for any supply or service whatsoever. In addition, respondents are advised that CalMHSA will not pay for any information or administrative costs incurred in response to this RFP; all costs associated with responding to this RFP will be solely at the interested party's expense. Not responding to this RFP does not preclude participation in any future RFP, if any is issued.

2 Project Scope of Work

The scope of this RFP is for Service Desk services only. This Service Desk will provide Level 1.5 technical support for CalMHSA users accessing the Streamline SmartCare EHR Application during a 12-hour period between 7AM-7PM PST, Monday through Friday.

Primary delivery goals of the Service Desk will include:

- Across all sections of the Scope described below, it needs to be noted that the application being supported is an Electronic Health Record and thus requirements around the process, procedures, and security infrastructure related to these Service Desk Functions MUST adhere to HIPAA and/or all applicable Protected Health Information ("PHI") Standards related to Patient Privacy and Security.
- Customer-focused quality support of the Streamline SmartCare EHR, effective, timely customer interactions, resolutions and ticket assignments.
- Improving CalMHSA's speed, efficiency, and effectiveness for Level 1.5 Service Desk customer interactions.
- Resolution, customer ticket reporting, logging, and tracking.



- Improving early identification of major incidents by correlating multiple related customer reports and taking appropriate action efficiently and effectively.
- Providing guidance to users for entering Service Requests and self-service tools that are available to customers (ex: password resets) and assistance in navigating to other support entities.
- Vendor Pricing as it relates to this RFP is to be provided on a tiered per-user basis. Tiers for which pricing is provided are as follows:
 - o Tier 1: 12,500 -13,500 Users
 - o Tier 2: 13,501 -14,500 Users
 - o Tier 3: 14,501 -15,500 Users
 - o Tier 4: 15,501 -16,500 Users
 - o Tier 5: 16,501 -17,500 Users

2.1 FUNCTIONAL REQUIREMENTS

2.1.1 Key Service Elements

CalMHSA customers will rely on the Service Desk to connect with CalMHSA services and support for the SmartCare EHR application. The Service Desk provides the first impression of CalMHSA for most customers. The Vendor must commit to and meet the SLRs stated in this RFP and provide excellent service to all CalMHSA's customers.

1. Vendor must maintain Service Desk Level 1.5 agent and management staffing at levels which will ensure that all required service levels are met while following CalMHSA procedures and guidelines.
2. Vendor will perform all Services in compliance with the then- current version of the Streamline SmartCare EHR's Library.
3. Upon CalMHSA's request, Vendor will provide CalMHSA with evidence that Key Personnel are certified in the Streamline EHR standards.
4. Vendor will provide a service desk which will be CalMHSA's Single Point of Contact ("SPOC") for all SmartCare EHR support issues.

5. Vendor will have a Continuity of Operations Plan or Disaster Recovery Plan in place designed to ensure services can be delivered in the event of a major service affecting event.
6. Vendor will ensure that Level 1.5 Service Desk agents record and verify the caller & pertinent information into a Vendor supplied Information Technology Support Service Management & Ticketing system, document the details of the ticket, document all diagnostic steps performed while the ticket is in the Service Desk's control, and assist the user with resolution or transfer to proper resolver group using existing Knowledge Base Articles.
7. For all tickets resolved by the Vendor, agents must document the solution steps and close the Incident per CalMHSAs procedures (via Vendor supplied ticketing system).
8. Vendor management must ensure that vendor agents identify Incident severity and follow Incident Management processes, as necessary.
9. Vendor management must ensure that vendor agents follow published guidelines for proper classification of priority and categorization of all Incidents.
10. Vendor management oversight shall be in place to ensure agent Call Service Time goal of 10 minutes or less. This oversight is critical to achieving customer resolution in a timely fashion and maintaining Level 1.5 Service Desk agent availability for incoming calls.
11. Vendor must have management structure in place to actively monitor and react to planned and unplanned changes in the environment that may affect call volume or content. This will include attending change board meetings and select project status meetings as required. Level 1.5 Service Desk agents must be kept informed and prepared to respond to calls related to changes or events.
12. Vendor management must ensure that Level 1.5 Service Desk agents are ready and able to interact with callers via phone, chat, e-mail, and update tickets in clear and concise English. Proper spelling and communications skills are essential to ensure quality services. Any Level 1.5 Service Desk agent quality issues must be addressed immediately and to CalMHSAs's satisfaction.
13. Vendor management must ensure the Level 1.5 Service Desk agents are trained and possess skills necessary to perform their functions at a sufficiently high level to meet the objectives of the Service Desk.
14. The Level 1.5 Service Desk agents are responsible for opening the Incident on the customers behalf and populating all pertinent information as outlined in CalMHSAs Procedures.
15. CalMHSAs reserves the right to change processes, procedures, and tools based on CalMHSAs's operational needs to support agency customers during the term of the contract.



2.1.2 Customer Interactive Communications

Vendor must support the following methods of communication and may propose other methods, subject to CalMHSA's approval. Vendor management oversight is essential and Vendor must ensure all intake methods are monitored in accordance with the SLRs. Level 1.5 Service Desk agents must be proficient in all forms of communication below.

1. Chat
 - a. Functionality via vendor supplied tool.
2. Email
 - a. Functionality part of CalMHSA's e-mail - vendor does not need to supply this tool.
 - b. Vendor will manage e-mailbox using CalMHSA procedures.
3. Phone Calls
 - a. This tool and functionality are a Vendor supplied requirement that the vendor will incur the cost of providing.
 - b. The Vendor must select and implement voice communications [e.g., Interactive Voice Response (IVR), Automatic Call Distribution (ACD), etc.] software and hardware needed to collect the necessary information to answer, log, and report on calls received by the Service Desk.
 - c. Vendor must provide an automatic phone call-back (virtual hold) system. Programming and design to be approved by CalMHSA, vendor must ensure that SLRs are attainable using this service.
 - d. Vendor system must include the functionality to easily add and update messages within ACD menu options to communicate major event status, direct callers to appropriate resources, and pass other urgent information or directions to callers in queue.
 - e. Vendor must provide real-time access to the Vendor's ACD system to allow CalMHSA management the ability to report on and monitor provided services as required.
 - f. Vendor's system must record all calls for review in the event of complaints, call quality or content reviews, or other uses.

2.1.3 Incident Management

The mission of the CalMHSA Incident Management process is to reduce disruptions to technology services and minimize business impact by effectively managing incidents. The Service Desk plays the lead role in achieving our mission.

1. The Level 1.5 Service Desk agent is responsible for assigning severity levels to Incidents based on impact and urgency; high level (not exclusive) definitions provided by CalMHSA. CalMHSA reserves the right to mandate the severity level assigned to any given Incident.



2. Level 1.5 Service Desk agents must be able to interpret the caller's description of the issue and accurately record it in the Incident ticket.
3. Level 1.5 Service Desk agents will provide Level 1.5 support for all ticket categories. Agents will utilize the Knowledge Base Articles & Videos, following the Level 1.5 troubleshooting steps outlined. The Vendor must use remote-control capability for troubleshooting when possible, document troubleshooting steps and resolve ticket, if complete. If unable to resolve a ticket, the Service Desk must hand the ticket off to the appropriate CalMHSA resolver group following procedures appropriate to the severity level of the Incident.
4. For Incident Tickets, Service Desk vendor management will ensure that Level 1.5 Service Desk agents follow the CalMHSA processes and procedures for these tickets. For Severity 3 or 4 Incident Tickets, Service Desk vendor management will ensure that agents follow CalMHSA processes and procedures for these tickets. During business hours, a warm transfer to CalMHSA Level 2 support may be used based on operational need. Current business hours are Monday through Friday from 6:00AM to 6:00PM PST.
5. Level 1.5 Service Desk agents will verify workstation connectivity to application or service and must follow CalMHSA-provided and industry standard troubleshooting to verify the issue.
6. Level 1.5 Service Desk agents will update existing tickets documenting any work performed or with any additional information provided by callers.
7. Service Desk management must ensure that agents recognize Incident correlation and trends via all intake methods.
8. Service Desk management must ensure that agents manage Known Issues and Problem correlation as well as Incident Parent / Child ticket relationships.

2.1.4 Password Reset

Password resets are a major call driver, Level 1.5 Service Desk agents will be responsible for performing the following when resetting a password:

1. The Service Desk agent will perform password resets for CalMHSA customers utilizing the SmartCare EHR application.
2. Before resetting any password, Service Desk agent will ensure that the agent validates the user's identity using CalMHSA approved processes and tools.

3. Service Desk management will ensure that the agents educate and train customers on self- service tools available for password resets to facilitate the use of self-service tools.
4. Service Desk management will ensure that agents perform password resets for CalMHSA customers utilizing the SmartCare EHR application using CalMHSA approved processes and tools.

2.1.5 Service Request/Service Catalog

A Service Request is submitted any time a user requires something new. The Level 1.5 Service Desk agent must understand the difference between an Incident and a Service Request. When the agent determines a Service Request needs to be submitted, the agent will assist the customer in navigating to any appropriate self-service resources or in resolving the issue, as applicable.

Service Desk management must ensure that the Level 1.5 Service Desk agents are properly trained to recognize when a Service Request needs to be submitted.

2.1.6 Knowledge Base

1. Service Desk management must collaborate with CalMHSA to promote and enrich the Knowledge Base to better assist Level 1.5 Service Desk agents. The vendor management team will meet Bi-weekly with the CalMHSA Knowledge Management Team, to review, update, and create knowledge articles to assist with quicker resolution to users' issues. CalMHSA Service Desk management approval will be needed before moving any article into the CalMHSA knowledge base. The CalMHSA Knowledge Team is responsible for publishing all Knowledge Base articles to production.
2. All processes and procedures must be recorded in the CalMHSA-provided Knowledge Base system and, accordingly, are the property of CalMHSA.
3. Vendor management must ensure that all Level 1.5 Service Desk agents are trained on, are proficient with, and follow the processes contained in the Knowledge Base articles.

2.1.7 Quality Control

Vendor Management is responsible for assuring quality service is provided by the Service Desk.

1. Customer Satisfaction Survey/Report - CalMHSA conducts customer satisfaction surveys to ascertain how customers rate the service and support provided; discover factors that contribute to customer satisfaction or dissatisfaction; and to give customers a voice to influence service priorities and potential initiatives. CalMHSA and Vendor management will review survey results and the Vendor must identify process improvements based on survey results.



2. Service Desk management must provide CalMHSA staff the ability to remotely monitor Level 1.5 Service Desk agent calls (Sometimes referred to as “service observe”) for quality assurance audit purposes.
3. All calls must be recorded for quality and security review by Service Desk management and CalMHSA management.
4. The Vendor must track/manage/report service levels against the SLR attainment metrics.
5. The Vendor must provide suggestions on how levels of service can be improved. Quarterly improvement plans for all SLR metrics that are not obtained are mandatory.
6. CalMHSA management real time view of ACD and reporting is required.

2.1.8 Key Vendor Management Administrative Requirements

1. Vendor management must provide and maintain recommended Service Desk operations and administration procedures. CalMHSA will review and, upon approval, publish such procedures into the CalMHSA Knowledge Base.
2. Vendor management must provide and maintain Service Desk remote device procedures in the Standards and Procedures Manual for CalMHSA review, approval, and publishing.
3. Vendor management must ensure Level 1.5 Service Desk agents record, categorize, prioritize, and log all issues in the Vendor-supplied Information Technology Support Service Management & Ticketing system.
4. Vendor management must ensure Level 1.5 Service Desk agents use the CalMHSA-approved scripts when answering calls.
5. Vendor management must host this service at the Vendor’s location within the continental US.
6. Vendor management must maintain staffing and skill levels of Level 1.5 Service Desk agents at the desk in order to attain Service Levels during peak traffic times as well as achieve average service level attainment.
7. Vendor management must ensure that the service desk meets the service levels outlined in this RFP.
8. Vendor management must maintain a Risk Management plan and be prepared to implement the plan at any time.



2.1.9 Staffing Requirements

1. Based upon the customers supported by CalMHSA and the selected vendor, all Service Desk staff and operations must be based in the continental United States.
2. The Vendor must provide experienced Service Desk management staff resources.
3. The Vendor must have Level 1.5 Service Desk agents that are proficient in answering calls, e-mail messages and chat, professionally, courteously, and in a timely manner consistent with the SLR attainment metrics.
4. Level 1.5 Service Desk agents must be proficient in multi-tasking, have excellent listening & verbal skills, and have work experience in a Level 1.5 IT Service Desk performing phone support.
5. The Vendor must establish training programs to ensure proficiency, understanding what Level 1.5 Service Desk agents can resolve as a first call fix, and an understanding of applicable Knowledge Base articles. Vendor must also ensure that Service Desk staff follows operations and procedures published in Knowledge Base articles.
6. CalMHSA Service Desk management staff, upon request, has the right to view the resumes of Level 1.5 Service Desk agents on the Service Desk.
7. If CalMHSA determines that any Vendor Staff poses a security risk to the organization or has an unacceptable work performance, CalMHSA may refuse access to or require the removal of that staff.
8. Upon request by CalMHSA for a Vendor staff member to be replaced, Vendor must replace such staff member within fifteen (15) business days of receipt of written notice. The replacement staff member must possess skills and experience which are equivalent to or better than those of the predecessor.
9. Should Vendor become aware that any Vendor staff member provided under this Contract poses an unacceptable risk or has been arrested for a felony or misdemeanor offense that may disqualify such Vendor staff member from operating or having access to CalMHSA systems and data, Vendor shall immediately notify CalMHSA. Should CalMHSA decide that the Vendor staff member must be replaced, Vendor shall immediately remove the staff member and their access to CalMHSA systems and propose a qualified replacement.

2.1.10 Training Requirements



CalMHSA has implemented mandated training courses that are required to be completed on a yearly basis. Vendor staff members that provide services under the contract must complete annual CalMHSA mandated training courses. All mandated courses are available online using a web browser.

2.1.11 Additional Training Requirement

The Vendor will be required to provide CalMHSA staff with training required to maintain and update proficiency with new technologies and applications throughout the contract term at the Vendor's expense.

2.1.12 Tools

1. The Vendor will use Vendor-supplied ticketing system to document users' issues, monitor intake queues, open, update and close tickets.
2. Vendor Service Desk agents will use Vendor-supplied remote control for any device for which it is enabled.
3. Vendor Service Desk agents will use vendor-supplied chat functionality
4. Vendor Service Desk agents will use vendor-supplied phone system.

2.1.13 Risk Management

The Service Desk is an essential function for CalMHSA; therefore, a Risk Management plan in the form of a COOP or a Disaster Recovery plan is required. Vendors must show that they have a plan for continuity of operations designed to handle a wide range of events or situations; from an event affecting a building such as a power outage or connectivity issue to a wide area event such as a pandemic, or any other issue or threat that makes it impossible for employees to report to their primary work location for a short or extended period. Documentation explaining how services will be maintained for short and extended periods of time is required.

2.1.14 Communication

1. CalMHSA system scheduled downtimes, existing problems or other types of issues where users are being impacted must be communicated using CalMHSA e-mail and/or the Vendor's ACD. The Vendor will be responsible for updating their ACD with information about any major outage or initiative, as directed by CalMHSA, to mitigate spikes in incoming volume.



2. Customers contacting the desk regarding existing major Incidents or known problems should be informed of the larger issues(s) as part of the initial contact.
3. Vendor will be responsible for other applicable service desk customer communication as required by CalMHSA.

2.1.15 Escalation Point of Contact

The Vendor must establish and provide a detailed internal escalation list, enabling CalMHSA management to raise concerns related to delivery of services. This should include designated contacts and levels of management to be contacted to correct and resolve such matters.

2.1.16 Key Performance & Service Improvement Requirements

1. The Vendor must maintain a continuous improvement program designed to make real and timely service improvements.
2. The Vendor must identify solutions that minimize the need to call the Service Desk (e.g., additional End User training, Self-Help Support opportunities) and actively work to move callers to these solutions.
3. The Vendor must document solutions to resolve Incidents and provide feedback for continuous improvement of the Knowledge Base Articles. The Vendor must work with the CalMHSA Knowledge Team and Service Desk management to review and implement any proposed changes.
4. Vendor suggestions for automation and process improvement will be required to undergo a stringent CalMHSA security review for CalMHSA approval. Suggestions requiring CalMHSA staffing resources for implementation are subject to CalMHSA staffing constraints and/or security requirements.

2.1.17 Key Personnel Roles and Requirements

CalMHSA requires that the following positions be designated as Key Personnel. Key Personnel are considered essential to the Vendor's ability to successfully provide the services required under this RFP. Vendor must ensure the continued availability of Key Personnel for the duration of the contractual relationship and shall not choose to replace Key Personnel without the prior written approval of CalMHSA. Upon approval by CalMHSA, the Vendor must provide the resumes of potential replacements with equal or better qualifications for CalMHSA's review, selection and approval within seven (7) business days, or as otherwise agreed to by CalMHSA. The departing Key Personnel must transition responsibility to the replacement personnel in accordance with a written Start-Up plan preapproved by CalMHSA.

1. Vendor Engagement Manager - Responsible for managing the contractual relationship with CalMHSA and oversight of the delivery of services. Serves as the primary point of contact for CalMHSA. The Engagement Manager role is accountable for the successful completion of all aspects of the resulting contract.
2. Service Desk Manager – Responsible for oversight of the Level 1.5 Service Desk agents. Manages the day-to-day operations and is accountable for maintenance of Knowledge Base articles, training staff on processes and procedures, and adhering to best practices.

2.1.18 Transition

CalMHSA may require the Vendor to provide uninterrupted Services after Contract termination/expiration ("Transition Services") as CalMHSA deems reasonable and necessary for CalMHSA to comply with all legal requirements for establishing a new contract and transition to the use of a replacement vendor or to otherwise continue the provision of Services, as necessary.

A. Transition Period

The Transition Period shall be determined by CalMHSA, and Vendor will be notified of the period in writing. CalMHSA shall consult with the Vendor prior to making such determination. CalMHSA reserves the right to amend the Transition Period subsequently, upon thirty (30) days' advance written notice to the Vendor.

B. No Interruptions in Service

At all times during the Transition Period, and unless directed otherwise in writing by CalMHSA, the Vendor shall continue all contractual obligations set forth in the Contract until such time as CalMHSA; (i) has approved the Vendor's proposed Transition Plan; and (ii) an orderly transition to CalMHSA, a third party, or the successor vendor has been completed pursuant to the approved Transition Plan. The Vendor shall be required to meet CalMHSA contractual obligations pursuant to this paragraph notwithstanding the issuance of a termination for cause or convenience by CalMHSA.

C. Transition Plan

Within fifteen (15) days of receipt of a notice of termination or three (3) months prior to the end of the term of the Contract, whichever event occurs first, the Vendor shall submit to CalMHSA for approval a detailed written plan for Transition (Transition Plan) that outlines, at a minimum, the tasks, milestones, and deliverables associated with the smooth transition of Services to CalMHSA, a third party or a successor vendor. Vendor agrees to amend the Transition Plan to include all other information deemed necessary by CalMHSA.

D. Cooperation



Vendor shall cooperate with CalMHSA to facilitate a smooth and orderly transition. Periodic project review meetings shall be held with representatives of the Vendor, CalMHSA, and the third party or the successor vendor.

2.2 DELIVERABLES

2.2.1 Start-Up Period Requirements

The Start-Up Period shall commence when the contract is executed by Vendor and CalMHSA. It is anticipated that the start-up period will be approximately 60 days in length. Vendor shall:

1. Present a detailed Start-Up Plan, within the first seven (7) days of the Start-Up Period that supports the following:
2. Establish and finalize operational procedures and guidelines, in coordination with CalMHSA. Examples of items to be addressed include establishing call priority levels, call categories, appropriate points of contact for all second and third level support for calls outside of Vendor's responsibility.
3. Develop a consolidated business calendar that provides a window of events during a calendar year that would generate greater than normal call volumes.
4. Process for the Vendor to be notified through the ITIL Change Management process of infrastructure updates/changes, introduction of new software or tools that may impact the call volumes. Vendor Service Desk management attendance is mandatory at Change Management meetings.
5. Review and suggest updates to initial Knowledge Base articles for all standard tools, customized and proprietary-based business applications for Level 1.5 Service Desk support requirements.
6. Develop and gain approval on reporting formats, data sources and transmission channels.
7. Review, refine and finalize the Start-Up Plan. Bidders must propose their initial Start-Up Plan and schedule as described herein.
8. Train all Vendor staff to use the tools and systems pursuant to CalMHSA policies and procedures.
9. Request and validate required system access and authorization to perform the Vendor-proposed services.
10. Validate baseline for call volumes, document technical environments supported, and supported business applications.



11. The Start-Up Period will end in approximately 60 days, at which time the vendor must start taking all calls during the Stabilization Period.

2.2.2 Stabilization Period Requirements

The Stabilization period shall not exceed ninety (90) days in length and will commence upon completion of the Start-up Period Requirements. During the Stabilization period, the Vendor must:

1. Be fully operational, following the operational procedures and guidelines established during the Start-Up Period.
2. Collect and report on the performance metrics and SLR's.
3. Provide Service Level Compliance information on the Service Level Requirements. The format and other details will be agreed upon during the Start-Up Period.

2.3 SERVICE DESK REPORTING

All reporting requirements will be driven from CalMHSA and appropriate Vendor tools, which will be the systems of record for all services delivered by the Service Desk. Summary and real-time data should also be accessible to CalMHSA for ad-hoc and on-demand reporting.

1. The Vendor must provide Service Desk reports on a daily, weekly, monthly, and annual basis.
2. The Vendor will provide and distribute reports for operational performance metrics from Vendor's ACD system.
3. The Vendor will create and deliver custom reports from the data that is available and other systems under Vendor's control and used to perform the services set forth in this document as requested by CalMHSA.
4. The Vendor will create and deliver any additional reports requested by CalMHSA as agreed upon by Vendor and CalMHSA.

2.3.1 Performance Reporting

1. The Vendor must provide monthly reports to CalMHSA that describe the Vendor's performance in all the elements of the SLR.



2. Vendor agrees to provide written monthly reports to CalMHSA, by the 7th calendar day of each month, for the preceding month, regarding compliance for each SLR Measurement as follows:
 - a. Statistics on Vendor's monthly actual and projected invoice amounts for the Service Desk, and statistics on Vendor's actual monthly performance.
 - b. Remediation plans for any areas of performance where SLR(s) have not been achieved.
3. Within fifteen (15) business days after the end of the 12-month period, Vendor shall provide a written report to CalMHSA for each SLR Measurement as follows:
 - a. Statistics on Vendor's monthly actual and projected invoice amounts for Service Desk.
 - b. Statistics on Vendor's actual monthly performance.
 - c. Remediation plans for any areas of performance where SLR(s) have not been achieved.
4. In addition, Service Levels Reports for all service measures must be available daily. CalMHSA requires a solution that provides access to the Vendor's Call Management System for real time and historic reporting, with both standard and custom report functionalities.

2.3.2 Status Meetings

Vendor agrees, at a minimum, to:

1. Meet monthly with CalMHSA to review service level performance and ensure that performance is consistent with the scope of the requirements, and to prepare a report of any remedial action required.
2. Meet quarterly with CalMHSA management to review service performance over past quarter, review service trends and reporting measures, review action items and resolutions, identify opportunities and areas of improvement.

3 Requested Information

The following response components are required for each Scope of Work. There is no minimum or maximum page limit for responses. CalMHSA is not responsible for costs associated with the development of responses nor shipping or delivery of the same.

Please submit the following components as part of your response. Please use the attached spreadsheet document to respond to questions 2., 3., and 4., below.

1. Cover Sheet;

2. Narrative description of Respondent's background information, to include, but not be limited to, previous experience supporting custom applications and/or custom implementations of COTS systems (e.g. Salesforce, SAP, etc.) as a large-scale application management service desk.
3. Narrative response to each section of the Project Scope of Work, stated in Section 2, above, addressing:
 - a. Previous experience providing applicable services and examples of such experience;
 - b. Respondent's plan for meeting the requirements identified;
 - c. Any specific deficiencies that would prohibit Respondent from meeting the requirements identified.
4. A timeline for initiating and on-boarding all Help Desk staff, and for completing necessary orientation and knowledge transfer to effectively perform work and carry out duties as described in the Scope of Work (see Section 2, above).
5. A proposed total budget for the Proposed Scope of Work as stated in Section 2, above.
6. Three (3) signed letters of support, including references from organizations with whom the Respondent has contractual or other business relationships who can substantiate the Respondent's capacity to provide such services as described in the Project Scope of Work, as described in Section 2, above.

4 Minimum Requirements

Respondent must meet the requirements below otherwise they may be considered non-responsive, and the proposal may be rejected at CalMHSA's sole discretion.

1. Respondent(s) must have a minimum of five (5) years of experience supporting custom applications and/or custom implementations of COTS systems (e.g. Salesforce, SAP, etc.), as well as equivalent experience in providing services as requested in the scope of work.
2. Respondent's staff must be located within the continental United States.
3. Respondent must not currently have a settlement agreement or claim against them with any of CalMHSA's member counties or any state agency. If there are current claims against the Respondent in excess of \$10,000 within the last five (5) years, Respondent must disclose claims information as part of their response submittal.
4. Financial Information: Respondent is required to submit copies of Respondent's most recent audited financial statements.

5 CalMHSA Rights and Responsibilities

1. CalMHSA is not responsible for representations made by any of its officers or employees prior to the execution of the Agreement unless such understanding or representation is explicitly included in this RFP or any written addenda to this RFP.
2. CalMHSA has the right to amend the RFP by written addendum. CalMHSA is responsible only for that which is expressly stated in the solicitation document and any authorized written addendum thereto. Such addendum shall be made available to each person or organization which CalMHSA records indicate has received this RFP. Should such addendum require additional information not previously requested, failure to address the requirements of such addendum may result in the Proposal Package not being considered, as determined in the sole discretion of CalMHSA. CalMHSA is not responsible for and shall not be bound by any representations otherwise made by any individual acting or purporting to act on its behalf.

6 CalMHSA Option to Reject Proposal Packages

CalMHSA, at its sole discretion, may reject any or all Proposal Packages submitted in response to this solicitation. CalMHSA shall not be liable for any cost incurred by a Respondent in connection with preparation and submittal of any Proposal Package.

7 Truth and Accuracy of Representatives

False, misleading, incomplete, or deceptively unresponsive statements in connection with a Proposal Package shall be sufficient cause for rejection of the Proposal Package. The evaluation and determination in this area shall be at CalMHSA's sole judgment and its judgment shall be final.

8 Submission Instructions and Requirements

Request for Proposal Timeline

EVENT	Key Dates
RFP Issued	12/21/2022
RFP Questions Due	1/16/2023
RFP Questions Answered	1/23/2023



EVENT	Key Dates
Deadline for Application Responses to be Submitted	2/7/2023
Application Review	2/7/2023 – 2/15/2023
Notice of Intent to Award *	2/22/2023
* Date of Notice of Intent to Award subject to change	

Submittal Address

All Submissions must be submitted electronically using CalMHSA’s e-Procurement Portal, Bonfire:

<https://calmhsa.bonfirehub.com/>.

RFP Questions and Clarifications

All questions and requests must be submitted through CalMHSA’s e-Procurement Portal at: <https://calmhsa.bonfirehub.com/>. The deadline to submit questions for this RFP is **January 16, 2023**. The FAQ responding to the questions will be posted on **January 23, 2023**, at <https://calmhsa.bonfirehub.com/> and on the CalMHSA website.

To ensure all parties have access to the same information at the same time, except as stated below, CalMHSA will NOT respond to questions as they are received and will not accept email or telephonic questions.

It is the sole responsibility of the Respondent to refer to the FAQs, which will be posted on CalMHSA’s e-Procurement Portal at <https://calmhsa.bonfirehub.com/>.

If a Respondent is unable to submit questions via the Bonfire e-Procurement Portal, the Respondent must provide CalMHSA with an email justification at info@calmhsa.org outlining why the Respondent is unable to do so.

If a question relates to a proprietary/trade secrets aspect of a proposal and the question would expose proprietary information if disclosed to competitors, the Respondent must mark the question as

"CONFIDENTIAL." With the question, the Respondent must submit a statement explaining why the question is sensitive. If CalMHSa concurs that the disclosure of the question or answer would expose proprietary information, the question will be answered by email reply, and both the question and answer will be kept confidential. If CalMHSa does not concur regarding the proprietary nature of the question, the question will not be answered in this manner and the vendor will be notified and asked whether the vendor would like the question to receive a public response or no response at all.

Withdraw

A Respondent may withdraw or amend its proposal, but only before the Application Submittal Deadline, directly on CalMHSa's e-Procurement Portal at <https://calmhsa.bonfirehub.com/>.

Review of Applications

CalMHSa will receive all applications and review for completeness and adherence to the RFP rules stated in this document. Following the initial review, all qualified applications will be reviewed and scored by a review panel. The evaluation panel will conduct a fair and impartial evaluation of proposals received in response to this RFP.

The review panel is comprised of individuals with varied backgrounds, to include professional expertise and experience, personal knowledge, etc. Panelists' information will not be disclosed as a matter of confidentiality. CalMHSa is committed to ensuring the RFP review panel is representative of California's racial, ethnic, and cultural diversity.

Selection will not be based exclusively on price or highest score. CalMHSa reserves the right to negotiate with Respondents who, in the opinion of the review panel, have submitted the best proposal in an attempt to reach an agreement. If no agreement is reached, CalMHSa may negotiate with other Respondents or may choose to extend the proposal period. CalMHSa also reserves the right to meet with vendors to gather additional information. Additional information may include, but is not limited to, a demonstration of skills described in the proposal.

Protest Procedures

Protests must be received no later than five (5) business days after the Notice of Intent to Award is posted on the CalMHSa website. The sole bases for protest are that the award was (1) in violation of law, (2) in violation of the provisions of this RFP, or (3) in violation of CalMHSa's procurement process. All protests must be in writing and (1) state in detail each and every ground asserted for the protest, citing to the law, RFP provision, or particular provision of the procurement policy on which the protest is based; (2) explain why the error prevented the aggrieved organization from being awarded the contract; and (3) identify the remedy sought.

Written protests can be sent to the following:

Via Email:

info@calmhsa.org

Via Certified Mail:

CalMHSA
Attn: Chief Administrative Officer
1610 Arden Way Suite 175
Sacramento, CA 95815

Within 14 days of receipt of any protest, CalMHSA's Executive Director will provide a written decision which shall be final upon transmission to the protesting party. If the Executive Director determines that the error identified by the protesting party has deprived that party from receiving the contract, the Executive Director may act to rectify the error, including but not limited to: cancellation of the RFP or proposed contract, correction or other revision of the awarded contract, termination of an improperly awarded contract, or affirmation of an existing contract if the discovered defect is immaterial or the Executive Director determines that affirmation is in the best interest of CalMHSA.

Notice Regarding Public Records Act Request

CalMHSA is subject to the Ralph M. Brown Act and the California Public Records Act. All proposals received for this RFP are ultimately subject to public review; however, during the competitive bid process, all proposals will be kept confidential. Upon award and execution of the contract by awardee(s), all proposals and supplemental information will be subject to public review, with the exception of those elements of a proposal which contain elements that are clearly marked as confidential or trade secrets. Any such designation should be accompanied by a brief explanation of the reason the information is non-public and protected from disclosure under California law. CalMHSA reserves the right to disregard such designations if they have been applied indiscriminately to non-protected information, and in no event shall CalMHSA, its agents, representatives, consultants, Directors, or Officers be liable to a responding party for the intentional or inadvertent disclosure of all or a portion of a proposal submitted under this RFP, regardless of whether it was marked as confidential or trade secret.

Although the California Public Records Act allows certain confidential or trade secret information to be protected from disclosure, CalMHSA may not be in a position to establish that the information submitted is protected. If CalMHSA receives a request for public disclosure of all or any portion of a proposal that has been designated as exempt from disclosure, CalMHSA will use reasonable efforts to notify the responding party of the request and give such party an opportunity to assert, at its own expense, a claimed exception under the California Public Records Act or other applicable law within the time period specified in the notice issued by CalMHSA and allowed under the California Public Records Act.



Format of Proposal

Proposals must be submitted through CalMHSA's e-Procurement Portal at: <https://CalMHSA.bonfirehub.com/>. Submissions by other methods will not be accepted. Internet Explorer 11, Microsoft Edge, Google Chrome, or Mozilla Firefox should be used for Proposal submission. JavaScript must be enabled.

Browser cookies must be enabled. Respondents should contact Bonfire at Support@GoBonfire.com for technical questions related to submissions or visit Bonfire's help forum at: <https://bonfirehub.zendesk.com/hc>.

Submission materials should be prepared in the file formats listed under Requested Information for this opportunity in the Bonfire Portal. All PDFs documents must be formatted in Times New Roman, 12 pt. font, double spaced, unless otherwise indicated in the Requested Information. The maximum upload file size is 1000 MB. Documents should not be embedded within uploaded files, as the embedded files will not be accessible or evaluated.