

# **EXHIBIT D**

## MEMORANDUM

Date: June 23, 2020

By: Meggan LaPorte, CPPO  
Chief Procurement Officer

SUBJECT: **EXECUTIVE SUMMARY**  
Request for Proposal #YH20-0001  
HEAplus Maintenance and Operations RFP

The Request for Proposals (RFP) commenced in accordance with A.R.S. § 36-2906.

### Timeline

1. RFP was written and reviewed by internal subject matter experts from AHCCCS and ADES and sent to CMS and FNS on September 23, 2019.
2. Notice of the upcoming solicitation was published in the Arizona Record Reporter on December 6, 2019.
3. CMS and FNS approved the publication of the RFP on January 16, 2020.
4. The RFP was posted on the AHCCCS website on January 17, 2020.
5. A Bidder's Conference was conducted on February 6, 2020.
6. Solicitation amendment one (1) response to offerors' questions was published on the AHCCCS website on February 10, 2020.
7. Solicitation amendment two (2) response to offerors' questions was published on February 28, 2020.
8. The RFP was closed on March 24, 2020, 3:00 PM (Arizona time) and four (4) proposals were received.

### Award Recommendation

A total of four (4) proposals were submitted to AHCCCS by the due date of March 24, 2020, 3:00 PM (Arizona time). A total of one (1) proposal was rejected and removed from the evaluation process. The evaluation committee recommends contract award be made to Accenture, LLP. A history of the RFP development process and proposal evaluation process is provided below.

### History of RFP Development and Release

netlogx, LLC (netlogx) was hired by the State of Arizona to develop the RFP to procure M&O services for HEAplus. The netlogx team met with key staff from the State of Arizona, AHCCCS and ADES, between March 25, 2019 and April 3, 2019 with the purpose of understanding the current state of the HEAplus application, and to define the future vision for its maintenance and operations.

netlogx facilitated requirements gathering sessions to define the future state, key deliverables, key staff, and Service Level Agreements (SLAs) for the ongoing M&O for HEAplus. Requirements gathering sessions were conducted on June 3, 4, 5, 6, 7, 10, 11, 12, and 13 and on July 3, 8, 9, 10, 11, 12, 15, 16, 17, and 19.

Following requirements gathering, netlogx developed a draft RFP and delivered the RFP to AHCCCS and ADES for review on August 9, 2019. netlogx then worked with AHCCCS and ADES to make

modifications to the RFP. AHCCCS sent the final RFP to CMS for review and approval on September 20, 2019 and ADES sent the final RFP to FNS for review and approval on September 23, 2019.

The Request for Proposals was published publicly on the AHCCCS website on January 17, 2020. Notice of the future RFP was advertised publicly in the Arizona Record Reporter on December 6, 2019. Approx. 100 vendors/potential offerors were notified through email of the RFP publication. A list of the vendors is contained in the procurement file. A Bidder's Conference was conducted on February 6, 2020. The written question deadline was February 7, 2020, and the offer due date was March 24, 2020, 3:00 PM (Arizona time).

Solicitation Amendment #1 was released February 10, 2020 and consisted of four (4) high priority questions and answers. Solicitation Amendment #2 was released February 28, 2020 and consisted of sixty (60) additional offeror questions and answers. Both solicitation amendments were posted publicly on the AHCCCS website along with the RFP.

#### Scoring Methodology

The evaluation committee met on August 30, 2020, to determine the scoring methodology and came to an agreement to apply the following point scale:

1. Offeror's Experience and Expertise of the Firm maximum points allowable of 475
2. Offeror's Method of Approach maximum points allowable of 275
3. Cost maximum points allowable of 250

#### Receipt of Proposals

Four (4) proposals were received and publicly opened on March 24, 2020 at 3:00 p.m. (Arizona Time) to the AHCCCS SFTP server in accordance with the RFP instructions:

1. Accenture, LLP
2. Deloitte Consulting, LLP
3. OptumInsight, Inc.
4. The Center to Promote Healthcare Access, Inc, dba Alluma

The proposal submitted by The Center to Promote Healthcare Access, Inc. dba Alluma was determined to be not susceptible for award and was rejected.

#### Evaluation Process

The three (3) responsive proposals were evaluated pursuant to the official evaluation criteria published in the Request for Proposals. The proposals were distributed to all committee members. The following subject matter experts served as evaluation committee members:

- Stacy Westerholm (AHCCCS)
- John Tunny (AHCCCS)
- Marshall Wilmot (AHCCCS)
- Kuruvilla Mathew (ADES)

netlogx participated in the Evaluation Process by scheduling Evaluation Meetings with the evaluation committee and facilitating conversation and tracking initial consensus scores, prior to Bidder's Presentations. The following netlogx team members participated in the evaluation process:

- Barbara Zenor
- Tyler Fosnaugh

All evaluation committee members and identified netlogx team members were required to sign a

Procurement Disclosure Statement/Confidentiality Statement at the commencement of the development of the RFP.

### Evaluation Meetings

The evaluation committee's first meeting was held on April 6, 2020. The formal agenda for the evaluation of the proposals was discussed. At this meeting the committee started to developed pros and cons for each proposal. The team continued this process April 9, 10, 13, and 15, 2020.

On April 22, 2020 clarification letters were emailed to three (3) offerors asking for clarification on portions contained in the proposal which were unclear. All the requested items were provided by April 28, 2020.

During the subsequent meeting April 29, 2020, the committee finished the initial scoring process and determined susceptibility of offerors.

### Bidder's Presentations

After the initial evaluation, all of the Offerors presumed susceptible for award at this time were invited to engage in Bidder's Presentations. On May 12, 2020, Bidder's Presentations were held with Deloitte Consulting, LLP and OptumInsight, Inc. On May 14, 2020, Bidder's Presentations were held with Accenture, LLP. The presentations were held virtually and were led by Meggan LaPorte, with participants:

- Stacy Westerholm (AHCCCS)
- John Tunny (AHCCCS)
- Marshall Wilmot (AHCCCS)
- Daniel Lippert (AHCCCS)
- Kuruvilla Mathew (ADES)
- Barbara Zenor (netlogx, LLC)
- Tyler Fosnaugh (netlogx, LLC)

Following Bidder's Presentations, the evaluation committee and netlogx team members met to adjust consensus scores as applicable, using the additional information provided by each Offeror in the Bidder's Presentations. These sessions were held on May 14 and 15, 2020.

### Final Proposal Revisions

Requests for Best and Final Offers ("BAFO") were sent by the Chief Procurement Officer on May 29, 2020 and the Offerors were requested to submit a final proposal revision by June 10 2020, 3:00 PM Arizona time. All final proposal revisions were submitted on time by email. On June 17 and June 18, 2020, the evaluation committee evaluated and scored the final proposal revisions. At this meeting the committee also made recommendations for contract award.

### Conclusion

After giving the proposals serious consideration and after examining the facts related to the evaluation criteria as published in the Request for Proposal, the Committee recommended a contract be awarded to Accenture, LLP. It is determined that this award will be the most advantageous to AHCCCS and the State of Arizona based on the evaluation factors set forth in the solicitation.

I concur with the committee's recommendation.

Attached and incorporated to this executive summary is the final scoring sheet

**SCORING SUMMARY**  
**RFP # YH20-0001**

	<b>Max Points</b>	<b>ACCENTURE</b>	<b>DELOITTE</b>	<b>OPTUMINSIGHT</b>
<b>ADHERENCE to MANDATORY REQUIREMENTS</b>	<i>PASS/FAIL</i>	Pass	Pass	Pass
<b>EXPERIENCE AND EXPERTISE NARRATIVE PROPOSAL</b>	<i>475</i>	268	180	254
<b>METHODOLOGY NARRATIVE PROPOSAL</b>	<i>275</i>	177	106	133
<b>COST PROPOSAL</b>	<i>250</i>	246	193	250
<b>TOTAL SCORE</b>	<i>1000</i>	<b>691</b>	<b>479</b>	<b>636</b>

Evaluation Committee Members Attestation:

We hereby attest that the points awarded to each offeror listed on this Scoring Sheet were scored in accordance with the established evaluation criteria and represent our best judgment of each offeror's proposal. As indicated by the scores and the justification in the Executive Summary, our recommendation for contract award is: **ACCENTURE**

*Stacy L Westerholm*

Stacy L Westerholm (Jun 24, 2020 11:08 PDT)

Signature

*Kuruvilla Mathew*

Kuruvilla Mathew (Jun 24, 2020 08:12 PDT)

Signature

*John Tunny*

John Tunny (Jun 24, 2020 08:28 PDT)

Signature

*Marshall Wilmot*

Marshall Wilmot (Jun 24, 2020 08:44 PDT)

Signature