



MONTANA DEPARTMENT OF ADMINISTRATION

Director's Office

Greg Gianforte, Governor
Misty Ann Giles, Director

doa.mt.gov

406.444.2460

doadirector@mt.gov

NOTICE OF INTENT TO AWARD

Solicitation Title/Event Name:

Solicitation Number:

Solicitation Close Date:

Notice of Intent to Award Post Date:

Issuing Contracts Officer contact information:

The State intends to award a contract to the apparent successful offeror(s) of the above-mentioned solicitation. The Notice of Intent to Award shall not be considered a binding commitment by the state.

Under the Montana Procurement Act, the State has made the relevant scoring matrix/bid tab for the above-mentioned solicitation available for public inspection. Comments from the public regarding the proposed award must be submitted to the Contracts Officer listed above within this 7-day notice period.

Apparent Successful Offeror(s)

Unsuccessful Offeror(s)

Category	Possible Points	Carelon Behavioral Health, Inc	ComPsych Corporation	CuraLinc Healthcare	Deer Oaks EAP Services	OptumHealth
Evaluated RFP Section	Point Values					
Step 1: Technical Proposal	1550 Total					
Section 1: Employee Assistance Program (EAP)	1400 Possible Points					
1.3.1 EAP Administration	250 Points	188.00	200.00	160.00	225.00	180.00
1.3.2 EAP Short-Term Counseling and Network	350 Points	290.00	275.00	250.00	325.00	275.00
1.3.3 Critical Incident/Crisis Response	200 Points	172.00	175.00	160.00	180.00	145.00
1.3.4 Educational Programs	150 Points	123.00	115.00	105.00	137.00	118.00
1.3.5 Work-Life Services	100 Points	87.00	85.00	80.00	90.00	78.00
1.3.6 Marketing/Communication/Reporting	50 Points	40.00	41.00	30.00	47.00	45.00
1.4 Account Management	200 Points	162.00	170.00	130.00	190.00	160.00
1.5 Implementation	100 Points	85.00	50.00	70.00	94.00	80.00
Section 2: Offeror Qualifications	150 Possible Points					
2.3 Offeror Profile and Experience	100 Points	82.00	85.00	74.00	93.00	77.00
2.4 Resumes	50 Points	45.00	45.00	30.00	45.00	35.00
Offerors must achieve a Technical Score of at least 1240 (80%) in order to move on to Step 2: Presentation	Offeror Technical Score Total:	1,274.00	1,241.00	1,089.00	1,426.00	1,193.00
Step 2: Oral Presentation / Interview	300 Points Possible					
Offerors Presentation	300 Points	220.00	240.00	0.00	275.00	0.00
Section 3 Cost Proposal	370 Points Possible					
Fixed Bid Price	370 Points	161.10	370.00	214.46	311.76	145.13
Equal Pay	111 Points Possible					
Equal Pay for Montana Women	111 Points	111.00	111.00	111.00	111.00	111.00
Subtotal	1,850.00	1,494.00	1,481.00	1,089.00	1,701.00	1,193.00
Cost Proposal	370.00	161.10	370.00	214.46	311.76	145.13
Bonus Points	111.00	111.00	111.00	111.00	111.00	111.00
Final TOTAL POINTS	2,331.00	1,766.10	1,962.00	1,414.46	2,123.76	1,449.13

Offeror (Company) Name:		Total Points Awarded:	
Carelon Behavioral Health, Inc		xxxxxx	
Category	Possible Points	Points Awarded	Mandatory Justification Comments for Points Awarded
Evaluated RFP Section	Point Values		
Step 1: Technical Proposal	1550 Total		
Section 1: Employee Assistance Program (EAP)	1400 Possible Points		
1.3.1 EAP Administration	250 Points	188.00	Offeror has multiple modes of access but mobile app is under development and a completion date was not provided. Digital front door enables across platforms but didn't explain in detail how that works. Online peer support is not included or provided at an additional cost. Response to security question was not represented and no detail on breach's. QA/QM program expands over system not just call center. Call center is evaluated monthly. High trust certification every 2 years. Clinician experience at masters level was less than 3 years. Wasn't clear who was included in program or detail household coverage or plan for future state needs. Wasn't clear if unlimited consultation is offered or included.
1.3.2 EAP Short-Term Counseling and Network	350 Points	290.00	Growing network of providers and expect to almost double is positive sign that they are growing but possible issue with recruiting. Credential 90% of providers within 60 days is good. EAP Turnover seems particularly high rate. Average point of contact to visit date is 5 days also seems long. Integrates with Blue Cross Blue Shield. PA recommended clinical reviews indicate that a facility will complete the PA process.

1.3.3 Critical Incident/Crisis Response	200 Points	172.00	Response is within 60 minutes with follow up plan at anniversary of event. Missing follow-up detail during first few month after event or if anniversary was the only follow up. Comes out of the 150 hours offeror but unlimited consultations. Also missing information such as a designated crisis response person or team identified.
1.3.4 Educational Programs	150 Points	123.00	Trainings could be available in person or virtual webinar and 400 topics available for free so very accommodating range of training timeframes and delivery methods. However, response indicated that the training hours come from the 115 hours included with critical incident response and we're looking for an unlimited training solution.
1.3.5 Work-Life Services	100 Points	87.00	Financial access has 24/7 availability access to online 60 minutes per issue consultation. Service availability times work with Montana's time zone/needs. Digital front door was discussed but functionality was not discussed in great detail. Appeared they had appropriate services for work/life balance and align with historical industry standard.
1.3.6 Marketing/Communication/Reporting	50 Points	40.00	Material normalizes accessing the EAP and makes the EAP more personal and relevant. Incorporate critical incident response into orientation. All calls receive satisfaction survey and utilize member satisfaction survey. Full suite of utilization data available but comprehensive reports are not sent monthly and that is highly important for State. Ad hoc reports are at additional cost. Mentions worksite profile but doesn't explain.

1.4 Account Management	200 Points	162.00	Generic organizational plan that doesn't include specifics that State asked for. Account manager is assigned and includes biweekly touch base, in person. Response to questions in 1 business day. Flexible approach to work with State. Adjust programs based on survey results. Utilization reports aren't provided as frequently as preferred. Didn't include geographic location of team or executive leadership information as part of team. The Performance Guarantees provided didn't indicate consequence for not meeting them.
1.5 Implementation	100 Points	85.00	Detailed plan moving to ongoing solution. Written from project management perspective. 90 day implementation but organization structure isn't provided. Limited details for resources needed for State to implement
Section 2: Offeror Qualifications	150 Possible Points		
2.3 Offeror Profile and Experience	100 Points	82.00	Experience with self help groups and large populations including public and private. 40 year old company is exceptional with good retention and longevity among executive team. No specifics regarding contract termination, litigation, or judgment.
2.4 Resumes	50 Points	45.00	Provided quality resumes for key staff. Most have 5 years plus and account manager has been with them for decades. Job descriptions are helpful identifying roles.
Offerors must achieve a Technical Score of at least 1240 (80%) in order to move on to Step 2: Presentation	Offeror Technical Score Total:	1274.00	
Step 2: Oral Presentation / Interview	300 Points Possible		

Offerors Presentation

300 Points

220.00

Presentation was difficult to follow along and didn't seem to use or address the prompt they were provided. Missed many key points and didn't touch on how mandatory referrals would be handled or anything about the unlimited consultation with the human resource personnel and managers. Digital front door and the mobile app seemed useful but unvetted. Didn't address the scale and scope of services for all State of Montana, not just one Agency.

Offeror (Company) Name:		Total Points Awarded:	
ComPsych Corporation		xxxxxxx	
Category	Possible Points	Points Awarded	Mandatory Justification Comments for Points Awarded
Evaluated RFP Section	Point Values		
Step 1: Technical Proposal	1550 Total		
Section 1: Employee Assistance Program (EAP)	1400 Possible Points		
1.3.1 EAP Administration	250 Points	200.00	Listed detailed intake process and performance measures an members have access to variety of contact points such as phone and web. Didn't outright explain differences between members contacting EAP voluntary versus using a manager referral. Follow up to critical incidents within progressive number of days and adequate timeframe between contact and appointment. Quality review cycle for call center is sensible and follow up satisfaction surveys show a very high level of approval. However, QA is reliant on surveys versus and actual QA revie process and doesn't explain how they identify issues or how problems are managed. Question regarding security measures did not confirm they can meet requirements and doesn't mention eligibility file. Peer support groups are not listed and didn't confirm notice of breech or how they monitor industry related security.
1.3.2 EAP Short-Term Counseling and Network	350 Points	275.00	Provider experience and turn over rate is great and network size is substantial and committed to build network as needed to meet states needs. Individuals can schedule appointment in 3 days. Missing detail as how case loads are accessible to providers. Didn't respond to evidence based question or explain steps to authorization or clinical review.

1.3.3 Critical Incident/Crisis Response	200 Points	175.00	Thoughtful approach outlined for how to deal with critical events and response time and experience is good. Unclear about follow up frequency or process or how determination is made for "clinically appropriate". Didn't provide designated contact for State but did identify critical incident support team. Didn't detail ability to respond onsite within 48 hours or states request for follow up.
1.3.4 Educational Programs	150 Points	115.00	Comprehensive sweet of program offerings and can customize to States needs. Training hours can be used toward training manager and development sessions and trainings written by professional trainers but didn't provide specific trainer requirements. Missing program titles and descriptions.
1.3.5 Work-Life Services	100 Points	85.00	Family source looks like its available over the phone and some website connection. Thoroughness of consultants completing an assessment and then determining needs. Unlimited number of contacts for financial services and legal consults for 30 minutes. Business day referral packet is nice and follow-up provided with personalized packet. Legal connect offers 30 minute consult.
1.3.6 Marketing/Communication/Reporting	50 Points	41.00	Develop targeting EAP tools based on new trends and news issues. Provides onboarding training and annually. Listed collaborative efforts with other States. Additional reporting at no additional charge since they have a robust and flexible data system and data indicates extensive feedback process. Didn't include delivery method for training.
1.4 Account Management	200 Points	170.00	Detailed performance guarantees and consequences if not met. Mentioned extensive support team with organizational chart but dd not include geographic location or list specific services
1.5 Implementation	100 Points	50.00	Didn't detail roles and responsibilities of staff or provide implementation and organization chart, timeline, or project management. Response indicates this information and experience is there but did not provide.

Section 2: Offeror Qualifications	150 Possible Points		
2.3 Offeror Profile and Experience	100 Points	85.00	Privately held corporation with experience with self funded, private, and public entities. Included list of other States they work with and testimonials. Retain 99% of their clients and identified no litigation pending. Did not provide details or identify top 5 clients that terminated contracts as requested. Account manager turnover seems high.
2.4 Resumes	50 Points	45.00	Only two resumes were provided, for account manager and director of account services, but those resumes showed extensive experience. Expected to see additional for key players.
Offerors must achieve a Technical Score of at least 1240 (80%) in order to move on to Step 2: Presentation	Offeror Technical Score Total:	1,241	
Step 2: Oral Presentation / Interview	300 Points Possible		
Offerors Presentation	300 Points	240.00	Presentation didn't follow the prompt that was provided and some information requested was only touched on briefly or missed. Didn't discuss 5 key points that distinguish them from other providers as requested. Covered a great deal of information and had a very detailed presentation that at least touched on most points.

Offeror (Company) Name:		Total Points Awarded:	
CuraLinc Healthcare		xxxxxx	
Category	Possible Points	Points Awarded	Mandatory Justification Comments for Points Awarded
Evaluated RFP Section	Point Values		
Step 1: Technical Proposal	1550 Total		
Section 1: Employee Assistance Program (EAP)	1400 Possible Points		
1.3.1 EAP Administration	250 Points	160.00	Program is available and dependents up to age 26. Requires parent or guardian to contact first for members under 18. Noted that intake process takes 22 minutes and comments like "never" and "always" is concerning. Mandatory at no additional cost but fitness for duty is 5k per case. Peer support group is also additional. Didn't provide eligibility profile. Didn't get a feel for web or mobile app functionality. HR management and consultants are a different team but not listed. Listed quality management and assurance aspects but no detail.
1.3.2 EAP Short-Term Counseling and Network	350 Points	250.00	Has a lot of providers established in Montana with good retention rates and credentialing models. Acceptable visit time turnaround. Missed care management program requirement, detail as to provider list, detail to network locations, geocaches report, and several other critical components.
1.3.3 Critical Incident/Crisis Response	200 Points	160	Crisis team is available around the clock to respond within hours but did not outline a clear follow-up process other than that is it tailored to event type. Critical incident response and training hours are combined in the 115 hours. Didn't provide designated contact for critical care staff.

1.3.4 Educational Programs	150 Points	105.00	Training solutions are available for employees and supervisors. Several training models in catalog that all can be in person or virtual but not very expansive types of training. Manager portal that provides access to services but didn't explain how/who could access. Trainings can be customizable but limited hours due to shared hours with crisis response.
1.3.5 Work-Life Services	100 Points	80.00	Outlined types and times of consults available and seemed consistent with standard. However, unclear if are any of these services on the website or call in only
1.3.6 Marketing/Communication/Reporting	50 Points	30.00	Identified utilization data is provided quarterly and annually, not monthly as required by the RFP. Other than orientation, everything else is additional cost.
1.4 Account Management	200 Points	130.00	Incomplete information. Missing detail has to how they ensure confidentiality. Performance guarantee is also missing. Support team and account manager info was all that was provided but didn't include org chart. Indicated attending meetings will also come from hours bank.
1.5 Implementation	100 Points	70	Identified assigned implementation director but did not answer additional questions such as detailed implementation plan etc.
Section 2: Offeror Qualifications	150 Possible Points		
2.3 Offeror Profile and Experience	100 Points	74.00	Org is privately owned and serve over 145 municipal clients with good retention rates. Only include three key differences out of five requested and fail to answer several questions. Didn't discuss similar past projects.
2.4 Resumes	50 Points	30.00	Only one resume provided for client resource manager. Only one summary of experience, no references were provided, and no other staff identified.
Offerors must achieve a Technical Score of at least 1240 (80%) in order to move on to Step 2: Presentation	Offeror Technical Score Total:	1089.00	

Offeror (Company) Name:		Total Points Awarded:	
Deer Oaks EAP Services		xxxxxx	
Category	Possible Points	Points Awarded	Mandatory Justification Comments for Points Awarded
Evaluated RFP Section	Point Values		
Step 1: Technical Proposal	1550 Total		
Section 1: Employee Assistance Program (EAP)	1400 Possible Points		
1.3.1 EAP Administration	250 Points	225.00	Shows high utilization rate and offers in person, clinical EAP referrals with confirmed provider referrals provided within two to three business days for routine cases with appointment availability in five days. Includes 24 hour hotline, texting function, and mobile app. Formal grievance process in place in addition to QA. Did not provide full privacy and security information but doesn't require eligibility file. The employer name is the only information that's required to receive services.
1.3.2 EAP Short-Term Counseling and Network	350 Points	325.00	Many providers located in Montana and deer oaks is working to add additional providers to the network. If they cannot find a provider in the specified location they can allow for telephone or video consulting. Demonstrated good retention rate of providers and staff. Outreach for appointment is provided in 5 business days. Very impressive existing coverage across Montana including rural areas. Did not answer how they select types of providers or how they do recredentialing.

1.3.3 Critical Incident/Crisis Response	200 Points	180	Incident team who responds for support follow professional standards and described detailed process used to deescalate. Incident managers can engage in 30 minutes but didn't note how quickly they can be on site just that there is a 99% satisfaction rating with onsite trauma response. Didn't mention where trauma professionals are located. CIRN team engages with management and professionals are required to complete 12 hours of training per year. Didn't provide contact for how follow-up is structured.
1.3.4 Educational Programs	150 Points	137.00	Trainings can be on demand, onsite, or webinar and monthly, on demand, or customizable. Webinar service is yearly and presents quarterly benefits and excellence certificate. Good samples provided. Unsure if they allow State to designate additional trainers.
1.3.5 Work-Life Services	100 Points	90.00	Offeror includes unlimited telephone consulting with financial counselor. 30 minute free legal consult and request a ride service. However, mediation services are referred outsourced.
1.3.6 Marketing/Communication/Reporting	50 Points	47.00	Described onboarding for new employees. Provides standard utilization reports via e-mail, monthly, quarterly and annually and can provide ad hoc reports with the state's request. Offers Numerous touchpoints to evaluate satisfaction. Material/printing costs are included.
1.4 Account Management	200 Points	190.00	Provided comprehensive summary of qualifications and work experience for the account manager and other key staff in a detailed Org Chart with geographic locations of staff. Impressive staff retention rates and provided good performance guarantees.

1.5 Implementation	100 Points	94	Very thorough response and included outline of key objectives and project plan that includes benchmark dates and deliverables. Identified aggressive implementation schedule with States targeted go live date. Indicated they would work with state on culture and goals
Section 2: Offeror Qualifications	150 Possible Points		
2.3 Offeror Profile and Experience	100 Points	93.00	Large network of providers and counselors nationally, with many in Montana. Focus is on public sector entities and employees. Provide EAP Services for University System and DMA. Key points that distinguish them are ability to be flexible.
2.4 Resumes	50 Points	45.00	Provided key employee resumes as well as info on call center system and teams
Offerors must achieve a Technical Score of at least 1240 (80%) in order to move on to Step 2: Presentation	Offeror Technical Score Total:	1426.00	
Step 2: Oral Presentation / Interview	300 Points Possible		
Offerors Presentation	300 Points	275.00	Very organized presentation that followed the prompt provided and hit all key points required. Went into excellent detail about proactively expanding their provider network and how partnership would work. Weren't able to describe methodology for target number of providers. Marketing materials described were impressive tool for increasing use and awareness. Had major discrepancy between 115 hours listed in their proposal to unlimited on one slide.

Offeror (Company) Name:		Total Points Awarded:	
OptumHealth		xxxxxx	
Category	Possible Points	Points Awarded	Mandatory Justification Comments for Points Awarded
Evaluated RFP Section	Point Values		
Step 1: Technical Proposal	1550 Total		
Section 1: Employee Assistance Program (EAP)	1400 Possible Points		
1.3.1 EAP Administration	250 Points	180.00	24/7 toll free number with digital platform with referral process in place. Navigation specialists answer calls but supervisors only sample 2-3 calls per month for quality. Members are required to contact providers to determine availability and qualification. Did not fully outline members eligibility. Would only meet with State quartet. Didn't respond to breaches.
1.3.2 EAP Short-Term Counseling and Network	350 Points	275.00	Geographic report shows several Montana providers but turn over rate is high. Network development is developed when brought on but didn't go into details. Turnaround time for visit seemed long for virtual and in person visits. Response does not answer how company selects provider types. Doesn't feel like members are a top priority.
1.3.3 Critical Incident/Crisis Response	200 Points	145	Incident response comes from bank of hours or for additional fee. Follow up only if members call back. Separate process on each intervention. Crisis response partner is third party. Requires the member to do a lot of the leg work which is not a benefit for a crisis management. Would have liked to see how they process critical incidents or what their strategy/approach is.

1.3.4 Educational Programs	150 Points	118.00	Trainers require relevant degree and 5 years of experience. Open to involving States trainers. On demand, virtual or in person and trainings can be designed based on utilization. Management of training hours is part of services bank.
1.3.5 Work-Life Services	100 Points	78.00	2 free 30 minute financial calls and legal services. Will preparation is a part of legal service. No credentialing of financial advisers. Fraud and identity theft provide a 60 minute consultation with 7 emergency responses pre determined.
1.3.6 Marketing/Communication/Reporting	50 Points	45.00	All communications are available digital format and use of member satisfaction surveys. Monthly reports to the state and accessible through online dashboard. Communication strategy is entirely electronic so no printing. Unlimited orientation support through webinars. ad hoc reporting may be additional fees.
1.4 Account Management	200 Points	160.00	Identified client executive and primary point of contact. Stated they will work with state to develop communication. Provided staffing plan and good summary of services and good detail on background on team members. No information on geographic location of support team. Didn't discuss how services can be provided but did offer performance guarantees.
1.5 Implementation	100 Points	80	Time to launch meets states goals. Roles described but not organization structure.
Section 2: Offeror Qualifications	150 Possible Points		
2.3 Offeror Profile and Experience	100 Points	77.00	Established in business 45 years with 120 public entities. Average turnover for account management personnel is good but executive team not identified. Detail missing about past projects or mergers or subcontractors. No details on cancelled Contracts
2.4 Resumes	50 Points	35.00	Provided summary of work experience for key contacts but not actual resumes or information on several personnel identified as staff.

Offerors must achieve a Technical Score of at least 1240 (80%) in order to move on to Step 2: Presentation	Offeror Technical Score Total:	1193.00	