

LTC Solicitation Process Outline

Release Phase I (June 2016) – Upon release of the solicitation, proposing firms will be required to submit in the specified timeframe the following:

- 1) CalPERS Security Agreement
- 2) Non-Disclosure Agreement
- 3) Minimum Qualifications Certification
- 4) Evidence of Minimum Qualifications

Release Phase II and De-Identified Data (August 2016) – Upon receipt of above mentioned items, a team of CalPERS qualified staff will review the MQ Certification to verify if those proposing firms meet the minimum qualifications in order to receive the de-identified data.

Confidential discussions (October 2016) – These discussions will be centered on the clarification of the de-identified data and other Scope of Work requirements as specified in the proposed contract.

Initial Offer Due (November 2016)

Review Initial Offer (November 2016) – Upon receipt of the initial offer, one or more subject matter experts will review and verify through program monitoring techniques the proposing firms' ability to meet the requirements as well as their proposed costs associated with the administration of the proposed contract.

Initial Offer Evaluations (November 2016 – January 2017) – Once findings have been presented and negotiation strategy determined, the initial offers will be evaluated and scored. This will include the following parallel steps:

Prepare and present Findings to executive management (February 2017) – Upon completion of the evaluation of initial offers, findings will be presented to executive management.

Present findings to PHBC (February 2017)

Prepare for Competitive Negotiations (January 2017)

Competitive Negotiations (January – February 2017) – Negotiations will take place with only the highest-rated Proposers. This grouping is called "the competitive range." Proposing firms not included in the competitive range will be notified. Negotiations will address deficiencies and significant weaknesses (technical and financial). During negotiations, proposing firms may be dropped from the competitive range when it is clear that they no longer have a realistic opportunity to receive an award.

Present negotiation outcome to executive management (March 2017)

Present negotiation outcome to PHBC (March 2017) – Those proposing firms in the competitive range will be presented to the PHBC. PHBC will determine which firm will be recommended to receive award of contract.

Contract Execution (April – May 2017)

Attachment 3a provides a timeline of events associated with the LTC solicitation.