

Trust

Alaska Mental Health Trust Authority

Technical Assistance

RFP 27-001M

Amendment #1

Issued September 1, 2026

This amendment is being issued to answer submitted questions and make revisions to the RFP.

Important Note to Offerors: You must sign and return this page of the amendment document with your proposal. Failure to do so may result in the rejection of your proposal. Only the RFP terms and conditions referenced in this amendment are being changed. All other terms and conditions of the RFP remain the same.



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COMPANY SUBMITTING PROPOSAL

AUTHORIZED SIGNATURE

DATE

Questions submitted by potential offerors and answers from the Trust:

Question 1: Section 4.02 sets a 5-page maximum for Submittal Forms B, C, D, and E. For an offeror applying to more than one key area under SEC. 3.01, does the 5-page limit apply once to the entire form (covering all key areas requested), or once per key area?

Answer: The 5-page limit applies once to the entire form, covering all Key Areas requested.

Question 2: Submittal Form B must be anonymous, but also asks offerors to document specific experience and qualifications. Beyond omitting the firm's name and staff names, how much identifying detail (e.g., specific past projects or personnel backgrounds) is acceptable before it risks disqualification?

Answer: Offerors must ensure the specific experience and qualifications included in submittal forms that require anonymity does not make the firm or team member identifiable.

Question 3: Section 4.09 caps hourly rates at \$200/hour. Does this cap apply per individual team member, or as a blended/average rate across the team assigned to a project?

Answer: Individual hourly rates over \$200 will cause the proposal to be deemed non-responsive.

Question 4: Section 4.09 describes cost content, including hours, expenses, overhead and profit, for which Submittal Form G as issued provides no fields, and Section 5.08 awards cost points on the basis of a total proposal price that the form does not collect.

Answer: The hourly rates included in Submittal Form G must be inclusive of all cost content listed in Section 4.09, but itemization is not requested or required. See Change 2 below.

Question 5: How we should structure our bid for Key Area B - Research and Evaluation. My understanding of the document is that the selection will be based on hourly rates, however there are elements of research and evaluation that will have fixed costs (for example we may need to pay incentives for survey participants, or buy a targeted list of individuals for a phone survey sample) and there is no way for us to convey that in the proposal. How should we address that?

Answer: Per Section 3.04 Contract Type, contracts resulting from this RFP will be time and materials based. Submittal Form G requests only team member hourly rates. Section 3.01 Scope of Work states that contractors will work with the assigned agency to develop a clearly defined scope of work and budget for the assigned project. Scopes for specific projects may include additional materials and travel costs if necessary to the project.

Question 6: Can you provide any insight into the past research and evaluation work that has been conducted in past years? This would be helpful in understanding the scope of the work. While I understand it is

deliberately open ended, it would be helpful to see examples of surveys or other work done in past years, and or just a basic summary of what was done in the past.

Answer: Examples of past work include evaluating Medicaid service implementation for a local nonprofit and exploring regional behavioral health needs of seniors. Projects vary year to year in topic and scope. Large projects that would include a statewide evaluation or system analysis would be outside of the scope of this project.

Question 7: Is there information on the type and/or number of previous requests for TA?

Answer: In FY25:

- 29 projects were requested, and 19 moved forward with a scope of work.
- Six projects were in Anchorage, three in Southeast Alaska, one in Kenai, two in Southcentral Alaska, and seven projects served statewide.
- The average project cost was \$21,844, with a low of \$5,610 and a high of \$50,000.
- The average length of a project was six and a half months.
- The most frequent project requests were service sustainability/feasibility (8) and financial review/planning (5).

In FY26:

- 17 projects were requested, and 16 moved forward with a scope of work.
- Six projects were in Anchorage, three in Southeast Alaska, one in Kenai, one in Southcentral Alaska, one in Southwest Alaska and four projects served statewide.
- The average project cost was \$26,746, with a low of \$6,525 and a high of \$45,228.
- The average length of a project was six months.
- The most frequent project requests were service sustainability/feasibility (6) and strategic planning (3).

Question 8: Section 4.02 requires that Submittal Forms B through E remain anonymous and contain no names that can be used to identify the offeror, expressly including company names, personnel names, project names, subconsultant names, and manufacturer, supplier or product names. Section 4.04 requires that Submittal Form B include a personnel roster identifying each person who will actually work on the contract, together with their titles and the locations where work will be performed, and also requires reference names and telephone numbers for similar projects.

Please confirm how offerors should reconcile these requirements. Specifically, should the personnel roster and reference contact information be provided on Submittal Form A rather than Form B, provided as a separate attachment excluded from the anonymity requirement, or provided on Form B using anonymized identifiers such as role titles and organization types?

Answer: The personnel roster required in Section 4.02 must remain anonymous. Proposers may use a variety of options to anonymize team members, such as using titles, role names, pseudonyms, letters, or numbers.

Question 9: Section 4.02 lists product names among the identifiers that must not appear on Submittal Forms B through E. Key Area E asks offerors to evaluate and recommend technology solutions, interfaces and software, and to evaluate interoperability between clinical and billing platforms. Please confirm whether an offeror may name commercially available software platforms and technologies when describing relevant experience or proposed methodology, or whether such platforms must also be described generically.

Answer: If product names would make the firm or team members identifiable, it should not be named in the proposal.

Question 10: Section 4.09 states that proposed costs must include all direct and indirect costs associated with performance of the contract, including but not limited to total number of hours at various hourly rates, direct expenses, payroll, supplies, overhead assigned to each person working on the project, percentage of each person's time devoted to the project, and profit.

Submittal Form G as issued provides fields only for Key Area or Areas, team member name, and hourly rate. It does not provide fields for hours, direct expenses, overhead, percentage of time, or profit. Please confirm whether Submittal Form G as issued constitutes the complete cost submission, or whether offerors are expected to provide the additional detail described in Section 4.09 in a supplementary document.

Answer: The hourly rates included in Submittal Form G must be inclusive of all cost content listed in Section 4.09, but itemization is not requested or required. Submittal form G is the complete cost proposal; supplementary documents will not be accepted.

Question 11: Section 3.09 provides that travel within Alaska may be required depending on project scope and geographic location, and that authorized travel will be reimbursed at actual cost in accordance with the State Travel Manual, AAM60. Please confirm whether contractor time spent in travel status is billable at the proposed hourly rate, and whether travel time and travel costs are excluded from the cost evaluation under Section 5.08.

Answer: Contractors may request approval for flight, hotel, transportation, parking and per diem in accordance with the State Travel Manual, AAM 60, when developing a project scope of work and budget. The Trust will not pay an hourly rate for a contractor to be in travel status.

Question 12: Please confirm whether the five year minimum in Section 1.04 must be demonstrated for each Key Area for which an offeror requests consideration on Submittal Form B, or whether it applies to the offeror's technical assistance and consulting experience overall.

Answer: Section 1.04 specifies the five year minimum experience be in the specific identified technical assistance categories.

Question 13: Section 1.01 describes the procurement as establishing a pool of contractors and states that this is a multi-award RFP. Please confirm the approximate number of contracts the Trust anticipates awarding under this RFP, and whether the Trust anticipates making awards across all six Key Areas.

Answer: The Trust does not anticipate any specific number of contracts awarding as the result of this RFP, but we do expect to make awards across all key areas.

Question 14: Submittal Form A requires offerors to name critical team members who cannot be removed or replaced from the project or their positions without written approval of the project director or procurement officer, and Section 3.12 restates this requirement. Given that the contract may extend through four one year renewal options and that work under the contract is intermittent and not guaranteed, please confirm the Trust's expectations for substituting critical team members over the life of the contract, including where an individual leaves the firm or is unavailable at the time a project is assigned.

Answer: Section 3.12 outlines the process to change a team member after a contract is underway.

Question 15: Section 3.01 provides that contractors will work with the assigned agency to develop a scope of work and budget for approval by the contract manager, and that contractors may include a scoping fee in their project budget not to exceed \$800, invoiced only after a Work Order is issued. Please confirm whether contractor effort spent developing a scope of work and budget for a project that does not ultimately result in an issued Work Order is unbillable and borne by the contractor.

Answer: A scoping fee for a project scope that is ultimately not approved by the contract manager will not be eligible for invoicing.

Question 16: Section 3.01 provides that the contractor works with the assigned agency to develop a scope of work and budget, and Section 3.03 requires each Work Order to state a total cost estimate and maximum project cost. Please confirm whether the Trust or the receiving agency provides an indicative budget or budget range for a project before the contractor develops the scope of work, or whether the contractor is expected to propose the budget in the first instance.

Answer: The budget for any project will be specific for that project. The contractor will work with the agency and the Trust to develop the project budget.

Question 17: Submittal Form A requires disclosure of any possible conflict of interest, giving current or recent employment by the State of Alaska as an example. Given that the Trust makes grants to beneficiary serving organizations including state and local governments, Tribal organizations, non-profits and service providers, please confirm whether the Trust considers it a conflict of interest, or otherwise disclosable, for an offeror to hold a consulting relationship with an organization that receives or is applying for Trust grant funding. Please also confirm whether such a relationship would restrict the

offeror from being assigned technical assistance projects involving that organization, or would restrict that organization from requesting the offeror.

Answer: Offerors should disclose any financial or familial relationship that may give the appearance of a conflict or cause speculation as to the objectivity of services to be provided by the offeror. Any restriction assigning specific projects to contractors will fully depend on the nature of the conflict.

Question 18: Section 5.02 sets out Qualifications Criteria totalling 50 points, Cost Criteria totalling 40 points and Preference Criteria totalling 10 points, and states that total evaluation points available is 100. The worked examples at Sections 5.03, 5.08 and 5.12 are based on 1,000 total points, 400 maximum points for cost and a 100 point Alaska Offeror Preference. Please confirm that for this RFP the total available points is 100, that 40 points are available for cost, and that the Alaska Offeror Preference under Section 5.12 is 10 points, being 10% of the total available points.

Answer: Section 5.02 Evaluation Criteria details the number of evaluation points for this RFP. The worked examples in the following sections are only examples showcasing how the math works.

Question 19: Is direct prior experience specifically serving Alaska Mental Health Trust beneficiary populations a minimum qualification or separately weighted evaluation consideration, or may relevant experience serving rural, underserved, Medicaid, Medicare, FQHC/community-health, maternal-health, and other healthcare populations demonstrate relevant qualifications for Key Areas A and C?

Answer: Section 1.04 Prior Experience does not require experience specifically serving Trust beneficiary populations.

Question 20: Is an Alaska-based physical presence required of the prime contractor, or may technical-assistance services be performed remotely when appropriate to the work order, with travel to Alaska when requested or necessary?

Answer: A location in Alaska is not required. Technical assistance services may be performed remotely with travel to Alaska on an as-needed basis.

Question 21: If an offeror does not rely on a subcontractor to satisfy the minimum experience requirement at proposal submission, may the contractor later propose a specialized subcontractor for a particular work order, subject to the Trust's prior written approval, or must all potential subcontractors be identified in Submittal Form F at the time of proposal?

Answer: Section 3.12 outlines the process to change a team member after a contract is underway.

Question 22: For an offeror seeking consideration under multiple Key Areas, should Submittal Forms B through E be submitted only once, with the responses addressing all selected Key Areas within each form's

stated page limit? Or may an offeror submit a separate set of Forms B through E for each Key Area selected?

Answer: A proposal must consist of only one copy of each submittal form. Offerors must include information about all selected key areas in their submittal forms.

Question 23: The “Trust’s project schedule” is mentioned several times in the RFP requirements. Can the Trust provide some additional details about the specific project schedule?

Answer: Project schedules will be project dependent, and will be established through the scoping process and finalized with a work order.

Changes to the RFP:

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Change 2: Section 5.08 Contract Cost (Cost Proposal) on page 21 of the RFP, remove the first paragraph and replace with the following:

Overall, 40% of the total evaluation points will be assigned to cost. After the procurement officer applies any applicable preferences, the offeror with the lowest average hourly rate will receive the maximum number of points allocated to cost per 2 AAC 12.260(c). The point allocations for cost on the other proposals will be determined using the following formula:

Change 3: Section 5.02 Evaluation Criteria, on page 19 of the RFP, remove the Cost Criteria table and replace with the following:

Cost Criteria		Weight
Cost Proposal	(Submittal Form G)	40
Total		40

Change 4: Section 5.04 Experience and Qualification on page 20 of the RFP, remove question 1) b): “Are resumes complete and do they demonstrate backgrounds that would be desirable for individuals engaged in the work the project requires?”

Change 5: Section 5.01 Summary of Evaluation Process on page 18 of the RFP, remove items 4 and 9 and replace with the following:

4) The PEC will independently evaluate and score the documents by individual Key Area based on the degree to which they meet the stated evaluation criteria. Proposals requesting consideration for multiple Key Areas will be evaluated and scored for each Key Area selected.

9) The Trust will then conduct any necessary negotiations with the offerors scoring over 60 points and award a contract if the negotiations are successful.

Change 6: Remove section 1.04 Prior Experience on page 4 of the RFP and replace with the following:

In order for offers to be considered responsive offerors must meet these minimum prior experience requirements:

- All team members providing technical assistance under this contract must demonstrate a minimum of 5 years of experience as a provider of technical assistance or experience consulting with organizations in specific identified technical assistance categories.
- Offerors must document three (3) specific projects and organizations worked with in the last five (5) years related to experience and qualification as a provider of technical assistance/consulting in specific technical assistance categories. Mental Health Trust projects should be excluded from this list.

An offeror's failure to meet these minimum prior experience requirements will cause their proposal to be considered non-responsive and rejected.

Change 7: Remove the included submittal forms A-F and replace with the attached: "RFP 27-001M Submittal-Forms rev 2026-09-01.docx"
