Request for Proposals:
Analysis & Management of Administrative Data

1 Overview

1.1 Contract purpose

This procurement will fund a contractor to provide computing and data analysis services to the Medicaid and CHIP Payment and Access Commission (MACPAC) on an ongoing and task order basis, using Transformed Medicaid Statistical Information System (T-MSIS) and other data. The contractor will also provide data management services, including activities related to data acquisition, transfer, storage, and management.

1.2 Background

MACPAC is a non-partisan legislative branch agency that provides policy and data analysis and makes recommendations to Congress, the Secretary of the U.S. Department of Health and Human Services, and the states on a wide array of issues affecting Medicaid and the States' Children's Health Insurance Program (CHIP). The U.S. Comptroller General appoints MACPAC's 17 commissioners, who come from diverse regions across the United States and bring broad expertise and a wide range of perspectives on Medicaid and CHIP. MACPAC serves as an independent source of information on Medicaid and CHIP, publishing issue briefs and data reports throughout the year to support policy analysis and program accountability. The Commission's authorizing statute, 42 USC §1396, outlines a number of areas for analysis, including:

- payment;
- eligibility;
- enrollment and retention;
- coverage;
- access to care;
- quality of care; and
- the programs' interaction with Medicare and the health care system generally.

MACPAC's authorizing statute also requires the Commission to submit reports to Congress by March 15 and June 15 of each year. In carrying out its work, the Commission holds public meetings and regularly consults with state officials, congressional and executive branch staff, beneficiaries, health care providers, researchers, and policy experts. Additional information on MACPAC and its work can be found at www.macpac.gov.

MACPAC uses many different data sources in its analyses of Medicaid policies and programs, including administrative data, cost report data, and others. In particular, administrative data allow for detailed analyses of enrollment, spending, and utilization for populations with coverage under Medicaid or CHIP. The data used under this contract are primarily federal datasets that are obtained through the Centers for Medicare & Medicaid

Services (CMS), but may include data from third-party vendors. Datasets used in the past include, but are not limited to:

- Medicaid Statistical Information System (MSIS)
- Medicaid Analytic eXtract (MAX)
- T-MSIS
- T-MSIS Analytic Files (TAF)
- Form CMS-64, CMS-21, and CMS-37 expenditure data
- CHIP Statistical Enrollment Data System (SEDS)
- Medicaid Disproportionate share hospital (DSH) audit data
- Medicaid state drug utilization and drug product data
- National plan and provider enumeration system (NPPES)
- Social Security Administration's Death Master File (DMF)
- First DataBank
- Symphony Health Integrated Dataverse

MACPAC also analyzes Medicare administrative data as part of its work on individuals dually eligible for Medicare and Medicaid. As part of this work, MACPAC has developed a data book on the dually eligible population in conjunction with the Medicare Payment Advisory Commission (MedPAC). Medicare datasets used in the past include, but are not limited to:

- Master Beneficiary Summary File (MBSF)
- Medicare Enrollment Database
- Common Medicare Environment (CME)
- Medicare denominator file
- Common Working File (Medicare Part A, Part B, and Part D claims)
- Part D prescription drug event data
- Medicare Advantage and prescription drug plan system
- Medicare-Medicaid Linked Enrollee Analytic Data Source (MMLEADS)
- Health Plan Management System (HPMS)
- Long-term Care minimum dataset
- Medicare Provider Enrollment, Chain, and Ownership System (PECOS)
- Medicare hospital cost reports

Examples of data analysis tasks that could be issued under this contract include, but are not limited to, the following:

- using MSIS/T-MSIS data to calculate Medicaid enrollment and spending by eligibility group and state;

- using MSIS/T-MSIS data to analyze utilization and spending for long-term services and supports;
- using Medicaid DSH audit reports, Medicare cost reports, and CMS-64 expenditure data to analyze DSH allotments and measures of uncompensated care; and
- using Medicare and Medicaid administrative data to create a data book with statistics on enrollment and spending for various populations who are dually eligible for Medicare and Medicaid.

On occasion, analytic work may require programming with survey data sources relevant to MACPAC work, such as the Medicare Current Beneficiary Survey or the National Health Interview Survey. However, this is anticipated to be infrequent, and expertise with programming survey datasets will not be considered in scoring. Rather, the contractor must have the ability to add and utilize staff with expertise needed for specific projects on short notice and in peak activity periods.

1.3 Contract scope

This contract shall include tasks and activities related to data acquisition, transfer, storage, and management, analysis, project management, and reporting. The contractor will, upon request, obtain, transfer, and document changes in data files and content, conduct analyses, document analyses so they can be replicated, and perform other tasks related to data storage, management, and analysis as requested.

Data needed for MACPAC analyses will be stored in a secured and federally-compliant data repository (see section 2.2.7), which may be easily accessed by any designated or authorized user on a remote basis, including MACPAC staff or designees. The contractor will provide programming and analyses based on specifications from MACPAC staff. The contractor will maintain detailed documentation of files residing in the repository that describe all variables, year of data, and changes from previous versions of the same dataset, and will maintain detailed documentation of the analytic specifications and programming used by contractor staff to carry out any analyses. This documentation will be available to MACPAC staff.

1.4 Contract objective

MACPAC will select a contractor capable of securing, cleaning, maintaining, and analyzing a broad array of administrative data as needed to conduct the activities and analyses needed to meet MACPAC's statutory obligations. The contractor will secure administrative data to the specifications required by applicable federal law. The contractor shall be available for quick turn-around as well as longer-term analyses. The contractor shall also be available for exploratory work, such as reviewing and validating new datasets and devising an analytic plan in response to a particular policy question. MACPAC will select a contractor that documents:

- procedures designed to conduct the transfer, storage, and maintenance of administrative data compliant with federal security standards and practices;
- a sufficient pool and mix of statistical programmers available on an as-needed basis to perform the necessary work, including surge capacity during peak periods;
- extensive staff knowledge and use of administrative data that could be useful in MACPAC analyses. The offeror's proposal shall contain examples of the contractor's use of as many of the datasets listed above (or other relevant data) as applicable. It is not expected that any contractor will have an in-depth expertise of all possible datasets that may be useful to MACPAC; however, in-depth knowledge of MSIS and T-MSIS data is required;
- staff knowledge and expertise in multiple programming languages, including, but not limited to, SQL, SAS, STATA, Python and/or other programming languages, including expertise manipulating and merging large, complex datasets;

- procedures designed to ensure quality control of work performed by the contractor's staff;
- experience serving as a task order contractor with the ability to reallocate staff to meet quick turn-around projects; and
- ability to summarize data runs and identify key findings in a clear and concise manner in both tables and memos.

This contract serves as the umbrella contract for future task orders. Award of this contract allows the contractor to negotiate future tasks over a base contract period, with the option of five additional contract years. MACPAC reserves the right to fund multiple tasks but does not guarantee any set level of funding or number of tasks to the awardee.

1.5 Contract type

This is an indefinite-delivery/indefinite-quantity (IDIQ) contract subject to firm-fixed price (FFP) task order assignments. Data management services will be funded through ongoing FFP task orders issued on an annual basis. Data analysis services will be funded through ad hoc FFP task orders issued on an on-demand basis.

1.6 Period of performance

The period of performance for this contract is a base period of five years and up to five one-year option periods, covering fiscal years 2027 through 2036 (Table 1). The period of performance, including all options, is as follows:

TABLE 1. Period of Performance

Period	Start	End
Base period	October 1, 2026	September 30, 2031
Option year 1	October 1, 2031	September 30, 2032
Option year 2	October 1, 2032	September 30, 2033
Option year 3	October 1, 2033	September 30, 2034
Option year 4	October 1, 2034	September 30, 2035
Option year 5	October 1, 2035	September 30, 2036

The work performed under this contract is currently conducted by an incumbent vendor. In the event a non-incumbent organization is selected through this procurement, the base period will reflect a transition period of six months (October 1, 2026 through March 31, 2027) during which design, development, parallel processing and testing will occur consistent with the transition plan requirements in Task 2.2.1. A non-incumbent awardee is expected to perform all of the functions under this contract independently no later than April 1, 2027, including the execution of task orders issued under Task 2.3. During this transition period (October 1, 2026 through March 31, 2027), a non-incumbent contractor shall invoice for Tasks 2.1 and 2.2 only (see section 1.7 below).

1.7 Fully-burdened labor rate schedule and other direct costs for base and option periods

For data acquisition, management, and storage, each offeror shall propose a firm fixed monthly fee, or the "data storage and management fee," for the tasks specified in Task 2.1 and Task 2.2.

The data storage and management fee shall each be inclusive of all direct and indirect costs for the tasks and subtasks as they are described in Sections 2.1 and 2.2. Under an awarded contract, costs for those tasks shall only be reimbursed according to the monthly fees.

For task orders issued under Task 2.3 below, the offeror shall propose fully-loaded, fixed hourly rates for all personnel potentially assigned to tasks under this contract for the multi-year period of performance. Each offeror's rates will depend on how personnel and positions are classified within each offeror's human resources structure or classification system.

Both the fees associated with Tasks 2.1 and 2.2 and the fully-burdened labor schedule must be included in a separate business proposal. For more information about the proposal submission, see Section 4.

1.8 Travel

Travel is not expected under this contract. In the unanticipated event travel is required as part of a task order, travel will be reimbursed in accordance with MACPAC's travel policy and supported by invoice. Economy class air fares will be reimbursed at actual cost up to amount listed under the City Pair Program fare. Lodging and/or per diems for meals and incidental expenses will be reimbursed, as appropriate, in accordance with the General Services Administration's (GSA) per diem rates available on GSA's website. No fee or profit will be paid on reimbursements for travel and per diems.

1.9 Expected quantity of task orders

Under this IDIQ, the minimum number of data analysis task orders MACPAC may issue under Task 2.3 is zero. During any given contract base or option period, the number of task orders issued under Task 2.3 is not expected to exceed seven.

2 Contractor tasks

2.1 Data acquisition and transfer

As part of this contract, the contractor shall conduct the following subtasks:

2.1.1 Acquisition of datasets. At the direction of MACPAC staff and to the maximum extent allowed under data use agreements (DUAs), other authorizations, and rules governing public use data files, the contractor will directly obtain required data. As needed, MACPAC will also obtain required data files and provide them to the contractor. The contractor shall be able to receive files in a variety of formats and through different media (e.g., hard drive) or processes (e.g., Enterprise File Transfer (EFT)). While MACPAC can help establish these processes, additional consideration will be given to contractors that already have experience with and/or established processes acquiring data directly from CMS. All file transfer mechanisms and protocols must meet CMS standards and requirements to ensure prompt data delivery. The contractor may, at the direction of MACPAC, be required to conduct analytic work within a CMS-operated

environment, such as the Virtual Data Research Center (VRDC) or the Integrated Data Repository (IDR). Additional consideration will be given to contractors with experience using these CMS environments.

2.1.2 Data use agreements. Many of the datasets used under this contract will be federal administrative data acquired under a DUA with CMS. The contractor will obtain, jointly with MACPAC, necessary DUAs and other authorizations such as memoranda of understanding necessary for the legal use of all datasets. The contractor will maintain a historical catalogue of all DUAs and authorizations past and present in use during the period of this contract that can be provided to MACPAC on demand. MACPAC shall be able to access these DUAs electronically or receive electronic copies for reference purposes.

2.1.3 Checking and validating new datasets. The contractor shall provide programming services supporting file establishment, testing, and documentation of new data sets. This includes copying and creating data files received for use in analytic tasks, comparing file documentation with actual file structure to ensure that correct files and documentation were received, dealing with data owners to resolve potential problems with data files received, editing files in consultation with MACPAC staff, and preparing descriptive statistics on file variables to check data ranges and identify potential problems with file variables to be used in each task.

2.1.4 Transfer of datasets. Files requested by MACPAC shall be transferred in compliance with all federal and other relevant requirements. The contractor shall provide mechanisms for providing MACPAC staff or contractors working for MACPAC quick and ready access to source and analytic files when requested via hard drive or other physical media, file transfer protocol (FTP) site, or a secure internet website.

2.1.5 Maintenance and management of data analysis tools. The contractor is responsible for licensing of, at a minimum, a current version of any necessary programming software and other licenses as required to perform the tasks specified in this statement of work. Licensing and hardware are not part of this contract.

2.2 Data and metadata storage and management

The contractor, working with MACPAC, will develop and implement a system for storing and cataloguing all data files and supporting documentation, and all changes to files, data elements, and supporting documentation throughout the performance period of this contract. The contractor will be expected to maintain large datasets (e.g., MSIS, T-MSIS) to allow for replication of prior analyses as well as potential analyses of historical trends. The contractor's approach to data storage and management for MACPAC must:

- store and maintain MACPAC data isolated from other contractor systems and clients;
- meet or exceed applicable federal security standards;
- guarantee an uptime of 99.99 percent or more;
- allow MACPAC discretion in the quantity of users needed to perform its analytic operations;
- support secure, remote access to authorized MACPAC staff and contractor personnel; and
- support advanced data management and analytics, including:
    - structured data storage of research-friendly analytic files;
    - statistical and programming tools; and

- a secure workspace environment.

2.2.1 Transition plan. The selected contractor, if non-incumbent, shall prepare a transition plan for transferring data, program files, documents, and any other information from the current contractor. This plan should include details on how the non-incumbent contractor would work with MACPAC to ensure continuity in computer programming services and quality assurance of the transfers. The transition plan should also include a plan for transitioning all analytic files, data, and services, as specified by MACPAC, to another contractor after the period of service under this contract is complete. If requested, the contractor shall provide any technical assistance that may be necessary in completing a transition to a new contractor to ensure continuity in computer programming services and with minimal disruption to MACPAC's analytic agenda.

2.2.2 Capacity. The contractor shall be responsible for managing the full complement of MACPAC-relevant data as needed for analytic demands. MACPAC analytic work requires ongoing, monthly receipt of approximately 32-34 TB (uncompressed) in T-MSIS data from CMS. In our current arrangement, these data are cleaned, processed, and stored in a manner that facilitates routine analysis of up to three calendar years of data, and periodic analysis of longer longitudinal periods or historic data. In addition to the T-MSIS data, our existing system contains approximately 215 TB of analytic or other files. Offerors are encouraged to propose innovative arrangements that maximize analytic flexibility while constraining storage costs for infrequently used data.

2.2.3 Data documentation and version control. The contractor shall develop, implement, and maintain a system for documenting changes to data files. Strict version control of all files must be well documented so that MACPAC analysts can easily identify 1) the most recent version of any data file and 2) any changes that may affect comparisons of estimates from the most recent version to previous versions (e.g., if corrections or changes were made between versions). Easily understandable data dictionaries shall accompany each data file and variable names shall be standardized so that trends can be computed or datasets across multiple time periods can be merged. The contractor will maintain an online library of file layouts and data dictionaries for source and other relevant file documentation that are easily accessible to MACPAC staff.

2.2.4 Computer program and analytic specifications documentation. The contractor, working with MACPAC, shall also develop, implement, and maintain a web-based system for storing and displaying analytic specifications (which may be conveyed by MACPAC staff in writing or verbally) and computer programs used by the contractor to create files or analyses. These specifications shall be accessible to all MACPAC analysts so that they can examine previous analyses that are similar to ones they are planning to conduct, and to review the historical discussions that occurred between MACPAC staff and the contractor regarding any questions, issues, or changes that were made during the course of the task, such as corrections of identified errors in file or variable construction, changes in variable names, changes in variable construction or methodology (not due to errors), or changes in file format.

2.2.5 Documentation of issues related to consistency across files and data analyses. The contractor will develop, implement, and maintain a system that captures issues related to coding, documentation, errors, or other issues that affect multiple analyses or data files. For example, the contractor may implement a system that alerts MACPAC users and relevant contractor staff when an error is identified in a CMS or other data file used by multiple analysts. The contractor shall develop, implement and maintain a web-based system that is available to MACPAC for documenting these alerts and changes. The contractor shall provide an export of the

documentation system (the web- based and/or other tracking system) in a usable format to MACPAC.

2.2.6 Storage and backup of data files and documentation. Previous versions of files, including the original (source) data, must be maintained to ensure reproducibility of estimates from past time periods. MACPAC must approve any file deletions in writing (e.g., for old files not likely to be used again). Files shall be easily identified as to source, data system, and time period. With MACPAC input, the contractor shall develop a mechanism to ensure regular, complete, and daily backups of task files, with specifications to be approved by MACPAC. These backups shall cover original (source) data, intermediate (derivative) analytic data files, programs used to produce intermediate datasets and analytic output, and data and task documentation. Files shall be backed up to offsite and redundant locations frequently enough to ensure that task work can continue with minimal delay and minimal loss of content using restored data from backups in the event of catastrophic loss of data. Backup storage procedures and sites must be approved by MACPAC.

2.2.7 Federal Information Systems Management Act (FISMA) compliance and data security. The contractor is responsible for storing and managing MACPAC data, analytic programs, and all associated files in a secure, segregated environment, and for documenting initial and ongoing compliance with the FISMA data security requirements. Data storage and management may occur in a system owned and operated by the contractor, or in a system procured by the contractor from a third party. In either case, the contractor will be required to document to MACPAC the system's accessibility, reliability, analytic performance, and security, sufficient to meet a standard of FISMA moderate. This may be achieved through the use of a FedRAMP-certified system. In the absence of FedRAMP, the contractor will be required to otherwise document its adherence to FISMA standards, including adherence to the National Institute for Standards and Technology (NIST) risk management framework. The contractor shall supply documentation to MACPAC sufficient to enable MACPAC to issue an Authority to Operate (ATO) within 30 calendar days of a request for such documentation, if deemed necessary or appropriate by MACPAC.

In managing and storing MACPAC data, the contractor must develop, deploy and adhere to a robust internal set of information security (IS) policies that are compliant with NIST standards, including, but not limited to, NIST SP 800-53, SP 800-37, and SP 800-171. The contractor shall:

- implement their own IS program that adheres to federal IS policies, standards, procedures, and guidelines, as well as industry best practices and DUA requirements;
- participate and fully cooperate with IS audits, reviews, evaluations, tests, and assessments of contractor systems, processes, and facilities, conducted by MACPAC or a designee;
- provide upon request results from any other audits, reviews, evaluations, tests and/or assessments that involve MACPAC information, MACPAC information systems, or the contractor's environment and general controls that would impact MACPAC IS;
- report and process corrective actions for all findings, regardless of the source, in accordance with federal or other applicable procedures (i.e., Health Information Portability and Accountability Act (HIPAA) or requirements of federal or private data use agreements);

- document its compliance with federal security requirements and maintain such documentation in the systems security profile;
- immediately notify MACPAC of any suspected or confirmed security incidents that may impact MACPAC information or information systems; and
- prepare and submit an incident report to MACPAC of any suspected or confirmed security incidents that may impact MACPAC information or information systems within five days of identifying the incident. Notifications of breaches shall comply with HIPAA requirements if applicable, see http://www.hhs.gov/ocr/privacy/hipaa/administrative/breachnotificationrule/index.html. See section 2.6 for further reporting requirements.

2.2.8 MACPAC analytic enclave access. The contractor shall create a mechanism for authorized MACPAC staff access to the contractor's secure, segregated MACPAC analytic environment, with direct access to analytic programming files, programming software required by MACPAC, and associated documentation (e.g., meeting notes, methodology documentation, and output files). Through this access, MACPAC and/or designated, approved contractor personnel shall have access and analyze MACPAC data in compliance with all applicable federal security, privacy, and confidentiality requirements. In addition, MACPAC and the contractor shall use the contractor's analytic environment as a repository for all ongoing project-related communications and maintain historical documentation of each task order, including technical specifications, table shells, and discussion of analytical decisions made as part of each task order (e.g., methodological decisions, data quality considerations, and data fixes).

MACPAC estimates that no more than 20 individual designated users would require access to the secure environment at any one point in time. Access shall be scalable for more or fewer users depending on MACPAC's needs, system performance, and other factors. The design and development of this external access shall be completed during the contract's base year and operational by option year 1. The contractor shall provide on-demand technical support for MACPAC users and approved contractor personnel in accessing the project environment during MACPAC's normal business hours.

2.3 Data analysis

2.3.1 Construction of analytic files. The contractor will create analytic files using statistical applications software (e.g. SAS), other application software (such as geographic information software or spreadsheet software such as MS Excel), or programming languages as decided in consultation with MACPAC staff. Files may be used by MACPAC staff or designated agents, or by contractor staff in subsequent analyses specified by MACPAC.

2.3.2 Statistical analysis. The contractor will be responsible for working with MACPAC analysts through all stages of project work. This may involve assistance in developing data specifications, creating analysis files, analyzing data, and developing and maintaining statistical and simulation models. Data specifications range from simple cross tabulations to complex modeling. MACPAC project analysts will provide written and verbal requests for empirical analysis with specifications such as the data files to use, variables to include, calculations to perform, procedures to use, and tables or other output to generate. The contractor shall discuss questions, assumptions, problems, and suggestions with the project analysts.

The contractor shall ensure that output is provided accurately and on time. This includes ensuring that programs are debugged, specifications have been carried out correctly, and the final product represents what MACPAC staff has requested. The contractor shall provide mechanisms for maintaining efficient and accurate computer programming that minimizes

MACPAC's total expenses and have in place quality improvement mechanisms that will ensure analyses are conducted accurately and efficiently and with minimal errors. Code and tables shall be reviewed by at least one member of the contractor's team other than the original creator prior to submission. Results shall be compared to benchmarks where available. The contractor must also have procedures to correct programmers' errors without MACPAC incurring additional costs for the extra time required to reproduce analytic results.

2.3.3 Data interpretation and policy analysis. The contractor will have staff committed to the project who can interpret the results of the data analyses. On occasion, the contractor will be asked to provide interpretation of data runs by providing bullets or text highlighting important findings. The contractor must also be available by phone and email to answer staff questions regarding the specifics of the data analysis, limitations of the analysis, and interpretation of the results.

2.3.4 Documentation of data analyses. The contractor will document all data runs by providing a detailed methodology, including annotated programming code. Documentation shall be designed and written to support replication of analyses in future years. The package shall allow MACPAC or an external contractor to replicate the same estimates using the same or future years of data. The program shall employ efficient methods for updating the program so that it will accommodate changes in variable and file names (e.g. "search and replace" commands). Complex analyses with multiple programs shall meet the following design specifications:

- the program package will apply a common structure to assign file names and variable names;
- the internal organization of the programs shall include section headers and subsection headers and additional brief documentation describing the task completed by each section of the program, and instructions to facilitate replication of estimates using future years of data;
- the package of programs shall be uniformly written either in the latest version of SQL, SAS, STATA, or other programming language as approved by MACPAC; and
- documentation will include all variable recodes and manipulation, and methodology necessary to understand how the variables were created and analyzed. Simple data runs may require somewhat less complete documentation, but shall include documentation sufficient that the analysis can be replicated.

The contractor may also be required to work with MACPAC to update the statement of work for a particular task to reflect any changes so that a record of analytic and programming decisions is available.

2.4 Staffing

The contractor shall demonstrate that a sufficient pool of experienced statistical programmers shall be available to respond to tasks on an as-needed basis. Under this task order, there may be multiple concurrent tasks, a single task, or no ongoing tasks. As such, the contractor must be able to increase available staff during peak times. In addition, the contractor must have programmers who are willing and able to meet the required criteria for accessing data through a research data center (RDC) or other secure channels as dictated by the requisite dataset.

These programmers shall have experience with many of the datasets listed above (or other relevant datasets). Each programmer is not expected to have an in-depth expertise of all possible datasets that may be useful to MACPAC; however, in-depth knowledge of multiple datasets is required.

2.5 Project management

The contractor shall manage the contract to ensure high-quality, timely, and accurate work, while ensuring efficient use of management, programming, and computer resources to minimize costs to MACPAC.

2.5.1 There shall be a designated project director (PD) who is the key liaison to MACPAC; this PD shall oversee the management of the contract, serve as the focal point for identified issues or problems, and direct all contractor staff who are part of this contract.

2.5.2 The contractor shall schedule and conduct a project kick-off meeting. The kick-off meeting shall be held virtually to discuss the purpose, goals, and timeline for this project. It must also include a discussion of MACPAC's project management approach and expectations, communications, risk mitigation strategies, and next steps. The contractor shall provide a proposed agenda to MACPAC in advance of the meeting and summary notes following the meeting.

To ensure close communication between MACPAC and the contractor, when there are ongoing tasks, the contractor shall schedule and participate in biweekly check-in conference calls with MACPAC staff to discuss deliverables, timelines, next steps, and any concerns. The contractor shall schedule the calls, provide an agenda in advance, and share notes on key decisions and follow-up items after each meeting.

2.5.3 The contractor shall deliver detailed budget estimates for each task.

The contractor must first submit a preliminary scope estimate to the MACPAC contracting officer's representative (COR) based on the draft statement of work (SOW) to ensure the scope of the task aligns with expected costs. This estimate is not binding or final, but employed in the ongoing development of the SOW in coordination with MACPAC.

After the MACPAC COR reviews and approves the preliminary scope estimate, the contractor shall develop an official budget estimate. This estimate shall include projected staff hours and costs required to complete various phases of a task order (including data development, specific analytic subtasks, project documentation, and project management). The official budget estimate shall be provided to the MACPAC Contracting Officer (CO) and the COR. The budget estimates for a task must be provided in advance of the issuance of the task order. MACPAC may require the contractor to work with staff to change the scope of a proposed or current task to reduce projected costs. MACPAC will use the budget estimates to inform the FFP for the task order.

2.5.4 For all tasks, the contractor shall keep the COR apprised of the ongoing costs of projects and shall notify the CO and COR if costs are expected to exceed the initial budget estimate. The contractor shall provide revised budget estimates if the scope of a task changes.

2.5.5 The contractor will ensure review and quality control of work performed by the contractor's staff on each task. The contractor shall detail this quality control process in its proposal. The contractor shall ensure that analyses are conducted accurately and efficiently and with minimal errors. This includes ensuring that programs are debugged, specifications have been carried out correctly, and the final product represents what MACPAC staff has requested. Datasets shall be validated for completeness and accuracy, including identifying data anomalies and outliers, and results shall be checked for reasonableness by comparing to benchmarks when available. Contractor shall have a mechanism in place (approved by MACPAC) through which difficulties on any project are identified quickly, and elevated for resolution as appropriate.

2.5.6 The contractor will insure programmers maintain sufficient concurrent and final documentation of work under each project task to allow other programmers to take over programming work when necessary, to call upon past programs for future work, and to allow MACPAC staff to review current and past tasks when requested. When similar data requests are made (e.g., recoded variables or an updated year of data for the same analysis) a new programmer must not have to, nor should they, redo the entire analysis as there shall be sufficient documentation and a program library needed to update the analysis, thus reducing cost.

2.5.7 The contractor will provide mechanisms that will allow the COR and other MACPAC staff to monitor the level of staff and computer resources going into ongoing tasks and the progress being made on individual tasks. These monitoring mechanisms shall also provide sufficient information to allow for a review of work performed to ensure consistency with billing on invoices.

2.6 Reporting

The contractor shall deliver to the COR:

2.6.1 Monthly progress reports covering all work accomplished during the reporting period. These reports shall include the contract number and project title, a basic summary of the work performed and the number of hours worked by labor classification for each active task request during the month. The accounting of hours by task request is also required when invoicing for services. As tasks are added (or completed), the contractor shall include these tasks in the monthly progress report.

2.6.2 On a schedule to be determined with MACPAC staff, written documentation of compliance with security requirements. Within 24 hours after a security incident is discovered, MACPAC shall be notified of any suspected or confirmed incidents that may impact MACPAC information or information systems. Within five days of such an incident, a full report shall be submitted to MACPAC, to include: the full details of the incident(s) with date and time stamps from a validated time source; the information and systems affected in the incident; the potential or confirmed data that was lost or compromised in the incident; full root cause analysis of the incident; and steps to remediate future incidents. Additional information will be required if data protected under the Health Information Portability and Accountability Act (HIPAA) was accessed.

2.6.3 Work with MACPAC to notify impacted agencies and individuals of any security breaches or data leaks consistent with requirements in applicable federal law, regulations, and DUAs. Where the contractor is deemed to be at fault for the security breach or data leak, the contractor shall take full responsibility for these notifications, including any costs thereof, after coordinating with MACPAC.

2.6.4 As such changes occur, reports of major changes to datasets, data elements, and documentation that may affect past or future analyses.

2.7 Deliverables

Specific tasks to be issued under this IDIQ contract shall be priced separately on an FFP basis, including a task order for data management services (Tasks 2.1 and 2.2).

Examples of deliverables for task orders issued under Task 2.3 include: tables with interpretation narrative, code and documentation, summary of findings, methods summary for issue briefs, sample size analyses, trainings, and contractor reports.

For reports, upon acceptance of the final report or other final deliverable, MACPAC will determine whether it will be published on the Commission's website as a contractor report. If MACPAC chooses to exercise this option, the contractor shall deliver a version of the final report that is copy-edited and compliant with Section 508 of the Rehabilitation Act (P.L. 93-112, as amended). To the extent this requires additional expenses beyond what were included in the initial production of the final report (e.g., adding alternative text to figures), this task shall be priced separately in the business proposal.

MACPAC will only accept final deliverables that incorporate previous feedback and that are clear, concise, and free of errors and typos. The contractor, at MACPAC's sole discretion, may receive up to two additional rounds of revision to create an acceptable report if the initial final deliverable fails to meet MACPAC's requirements. Final deliverables that do not meet MACPAC's requirements when submitted in their final revised states (to the extent revision rounds are allowed by MACPAC), will not be considered accepted. In such cases, MACPAC may terminate the task order without further payment or, at MACPAC's sole discretion, work with the contractor on a negotiated resolution. More information is available in Appendix A: Standard Terms and Conditions.

3 Proposal Submission and Evaluation

Separate technical proposals and business management and cost/price proposals must be submitted in electronic format (either MSWord or .pdf) by no later than **June 30, 2026 at 5:00pm ET** via MACPAC's secure submission portal: https://macpacgov.app.box.com/f/b98573b5187c4f61824678345e0422ef. Proposals received after this date and time will be deemed late and not considered for award. Emailed proposals will also not be considered.

All proposals will be kept confidential. You will not be able to view or access any other proposals in our submission portal. Each submission to our document storage system will be timestamped. Larger files may take longer to upload, so please plan accordingly. If you would like to set up a test of the submission process in advance of the submission date, please email contracts@macpac.gov.

- Offerors must have two past performance questionnaires submitted via https://macpacgov.app.box.com/f/b98573b5187c4f61824678345e0422ef by **5pm ET on June 30, 2026**. The past performance questionnaire is included in Appendix B for this procurement.
    - Offerors shall send the questionnaire to previous or current clients (may include federal and state governments, think tanks, and academic institutions), to be filled out by the client and sent directly to MACPAC.
    - Offerors shall not pre-fill or otherwise influence the client's assessment in the questionnaire in any way.

3.1 Technical proposal

To facilitate technical proposal evaluation, offerors shall submit a separate enclosure entitled, "Volume I, Technical Proposal." To expedite evaluation of submitted proposals, each offeror's technical proposal shall contain the following major sections in the order listed below. In combination and excluding appendices, this volume shall not exceed 80 pages in length.

1. Executive summary
2. Understanding of MACPAC's mandate and scope of services

3. Technical approach
4. Mock task order proposals
5. Management plan
6. Proposed personnel qualifications
7. Organizational qualifications and past performance
8. Disaster recovery and business continuity plan
9. Copies of security certifications and independent security audits
10. Appendix A: Resumes for all proposed professional personnel

Mock tasks

Technical proposals must include two mock task order proposals to be considered.

1. Offerors must submit a proposal to conduct annual updates to the MACStats publication based on the most recently available T-MSIS and CMS-64 data. MACStats is published annually in December and updated regularly on macpac.gov. This publication brings together the range of Medicaid and CHIP statistics—including eligibility and enrollment, benefits, service use, and access to care, and state and federal spending—that are often difficult to find across multiple sources. A number of tables in MACStats use MSIS/T-MSIS data to calculate enrollment and spending by eligibility group, state, and type of service. In its mock task proposal, each offeror shall propose updates to the following MACStats exhibits:
   - Exhibit 14. Medicaid Enrollment by State, Eligibility Group, and Dually Eligible Status
   - Exhibit 22. Medicaid Benefit Spending Per Full-Year Equivalent (FYE) Enrollee by State and Eligibility Group
   - Exhibit 30. Percentage of Medicaid Enrollees in Managed Care by State and Eligibility Group
2. Offerors must submit a proposal for an analysis that estimates behavioral health utilization and spending among Medicaid enrollees using the most recent, complete year of T-MSIS data. The analysis should estimate prevalence of behavioral health conditions, as well as utilization of and spending on behavioral health services among those with behavioral health conditions, at the national level. Select two beneficiary characteristic categories for stratification of the data (e.g., age group and gender).

Each of the offeror's two mock task proposals should include:

- sample table shells;
- description of the analysis, to include at minimum:
  - a summary of included variables from each data source;
  - how particular subgroups, such as eligibility, type of service categories, behavioral health conditions, and beneficiary characteristics, are constructed;
  - the proposed approach at a high-level (do not include specific codes);
- a staff loading chart;
- a project timeline; and
- a project budget.

This section of the proposal must not exceed six pages in length; sample table shells may be included in an appendix and do not count toward the overall or section page limit.

3.2 Business proposal

To facilitate proposal evaluation, the offeror shall submit as part of the proposal a separate enclosure entitled "Volume II, Business Management and Cost/Price Proposal." The business proposal will be evaluated for compliance with the government's requirements and reasonableness of the proposed rates; unresponsive or unacceptable business proposals may disqualify bidders from further review. This volume shall consist of the following sections at minimum:

1. Direct and Indirect Fixed Costs for Data Management and Storage
2. Fully Burdened Labor Rate Schedule and Other Direct Labor Costs for Data Analysis
3. Exceptions/Assumptions and Rationales

Fully burdened labor rates are defined as consisting of hourly base labor rates plus out-year escalations, applicable indirect burden costs (fringe benefits, overhead, general & administrative), and profit. All fully burdened FFP labor rates shall be rounded to the nearest cent.

The contractual period of performance will begin October 1, 2026 and end September 30, 2036. The contractual period of performance for the base period will be October 1, 2026, and end on September 30, 2031, with option periods 1 through 5 beginning October 1 annually and ending September 30 annually. Offerors shall propose data management and storage fees for the entire contractual period without annual escalation. Offerors shall propose fully burdened FFP labor rates for data analysis only for the base period. If and when option periods are executed, incumbent contractors would propose labor rates for those periods.

3.3 Questions concerning the request for proposals

Questions regarding this Request for Proposals must be submitted via Google form no later than **June 5, 2026 at 5:00pm ET** via this webform. MACPAC will work to answer all questions as expeditiously as possible to assist offerors with preparation of their proposals. Responses to questions posed by offerors will be issued as an amendment to the solicitation and posted no later than June 10, 2026 at 5:00pm ET on https://sam.gov/.

3.4 Scoring

MACPAC seeks to award this contract to the offeror that represents the best value to the government. MACPAC considers both technical expertise and price in its source selection. Proposals will be scored based on the following criteria:

- soundness and acceptability of proposed pricing (10 points);
- understanding of MACPAC's need for and use of survey computing services (10 points);
- qualifications of the organization and proposed staff, as well as a demonstration of sufficient staff to perform computing tasks on short notice and procedures for ensuring that staff will be able to work on several concurrent tasks (15 points);
- documentation of robust organizational data management, security standards and procedures, and adherence to federal information security requirements (20 points);
- management plan, including how the offeror plans to use project staff and corporate resources to complete task requests and ensure the quality of deliverables (10 points);
- mock task proposals (20 points); and

- experience in conducting and managing similar contracts, including an assessment of the Offeror's past performance submissions (15 points).

Responses to this Request for Proposals must be complete according to the requirements outlined in this section. MACPAC reserves the right to disqualify incomplete proposals from additional review.

At the conclusion of its review of written technical and business proposals, MACPAC may request additional information in writing from offerors. MACPAC may additionally request virtual panel interviews with offerors to complete its assessment of proposals. MACPAC will communicate the outcome of this Request for Proposals to all offerors at the time the contract is awarded, including by updating the posting in SAM.

Additional terms and conditions for this contract are included in Appendix A to this RFP. MACPAC expects limited modifications to this document and plans to update the RFP, via amendment, with the final terms and conditions. This amendment is expected well in advance of the deadline for proposal submission to ensure offerors have the opportunity to review the final document.