Request for Proposals: Strategic Consulting Services – Mental Health Cohort Pilot

Responses to Submitted Questions

Budget

1. Is there a budget range or not-to-exceed amount CACTX has established for this engagement?
    - CACTX is seeking proposals from qualified vendors who can successfully complete the full scope of work within the timeline indicated within the RFP, and respondents should outline expected costs accordingly. While CACTX has not established a specific target budget range for this project, the applicant's competitive cost and value to CACTX will be considered during the review process.

Project Approach

2. Does CACTX have an initial target number of CACs for the pilot cohort, or should the consultant recommend the optimal cohort size based on readiness and operational complexity? Will CACTX pre-identify potential pilot sites, or is site selection part of the consultant's scope?
    - CACTX would like the chosen consultant to make recommendations for an optimal cohort size based on CAC readiness information obtained in the Clinical Practice Management benchmarking. The consultant should help inform the decision-making strategy for selection of pilot sites.

3. How many CACs does CACTX anticipate including in the operational baseline sample?
    - All 71 Texas CACs should be included in the Clinical Practice Management Benchmarking.

4. What types of legal structures is CACTX currently considering for the cohort model (e.g., shared services entity, consortium, fiscal sponsorship, new nonprofit)? Does CACTX anticipate needing external legal counsel, and if so, will counsel be provided by CACTX or should the consultant propose subcontracted legal expertise?
    - CACTX is seeking input from the chosen consultant on the optimal structure for the cohort model. CACTX does have external legal counsel that can be consulted on organizational structure and related legal considerations as needed. The

consultant should not propose contracted legal expenses for advisement regarding cohort model structural considerations.

5. Will CACTX provide full access to the mixed-methods study, planning documents, and any existing operational assessments? Are there any restrictions on their use in the deliverables?
    - CACTX will provide the chosen consultant with all background information and work products associated with the mixed-methods study.

6. Are there specific findings or recommendations from prior research that CACTX considers non-negotiable or foundational for the pilot design?
    - CACTX will work with the selected consultant to provide all needed context, background information, and foundational concepts at the start of the contract period.

7. Should the March 15, 2027 initial draft of the pilot design cover Workstream B in full (legal structure, financial model, governance, and program design), with launch planning to follow in Workstream C?
    - The initial pilot design draft should contemplate all components listed above at a level of detail that would allow for the presentation of the pilot design to the CAC network but is not expected to include final implementation details across all components.

8. Does CACTX have a shortlist of EHR vendors already under consideration, or should the consultant conduct a full landscape review? Are CACs currently using any shared or preferred systems that should be included in the evaluation? Should the cost estimate include statewide implementation or only pilot cohort implementation?
    - CACTX does not have a shortlist of EHR vendors. The consultant should plan to conduct a full landscape review. The cost-estimate should contemplate an initial pilot-cohort implementation but include figures for what statewide implementation would require as well.

9. How large is the CAC Mental Health Task Force, how often does CACTX expect it to meet during the engagement, and will CACTX convene it, or should the consultant plan and facilitate its sessions?

- CACTX will partner with the chosen consultant to identify a charter and scope, including a target size, makeup, and meeting frequency, for the CAC Mental Health Task Force as part of this engagement. CACTX would be the official convenor of the Task Force with consultant input on agenda and desired outputs of the meetings.

10. Does CACTX anticipate the Evaluation Plan being used statewide, or only within the pilot cohort? Are there existing data governance frameworks within CACTX that the consultant should align with? Will CACTX provide legal review of HIPAA/Texas law compliance, or should the consultant propose subcontracted expertise?
    - CACTX will utilize the Evaluation Plan statewide. CACTX will provide the chosen consultant will all current data collection requirements and current evaluation methodologies. The consultant should deliver an Evaluation Plan with Texas legal requirements and HIPAA law having already been contemplated.

Working with CACTX

11. Does CACTX have a preference for a consultant with a Texas presence, or is national experience with statewide systems equally acceptable? How important is in-state presence for this engagement, given that much of the work involves analysis, design, and planning rather than direct service delivery? Are there expectations for in-person meetings in Austin or at CAC sites, and if so, how frequently?
    - CACTX does not have a preference on a consultant's primary location. We seek to identify a consultant with the most closely aligned background and skillset to undertake this project. CACTX has found it helpful to have at least one in-person meeting with internal team members, either as a kick-off or near the completion of the project, or both. As a reminder, proposals should contemplate any travel costs required.

RFP Response Requirements

12. The RFP requests three years of audited financial statements. As a small consulting firm, SSG does not undergo formal audits. Would reviewed or compiled financial statements, tax filings, or other financial documentation be acceptable? Is the audit requirement mandatory for all applicants, or can CACTX accept alternative documentation for small

businesses? Would CACTX consider a financial stability narrative in lieu of audited statements?

- If there is an acceptable reason for less than three years of audited financial statements, please explain within the proposal and include the organization's compiled financial statements and tax filings, as well as any other relevant non-audited financial documentation demonstrating financial stability, for review.