

SOLICITATION ADDENDUM

Date: **April 18, 2014**
Subject: **Environmental Claims Administration and Associated Technical Services**
Solicitation Number: **6100024372**
Due Date/Time: **May 2, 2014 at 3:30 pm ET**
Addendum Number: **2**

To All Suppliers:

The Commonwealth of Pennsylvania defines a solicitation “Addendum” as an addition to or amendment of the original terms, conditions, specifications, or instructions of a procurement solicitation (e.g., Invitation for Bids or Request for Proposals).

List any and all changes:

- **Part IV-3, G. Project Management** has been amended to include the following language, “Although there are no geographical restrictions stated in the RFP, a local office would be practical as face-to-face meetings will be required as needed, especially during the transition activities. The selected offeror will also be expected to host bid review meetings at their offices and attend quarterly USTIF Board meetings that are held in Harrisburg. Materials will be made available to all appropriate parties through use of the imaging system.”
- The Pre-Proposal Conference Sign-In Sheet and the Official Questions and Answers for this procurement are attached to this Addendum 2 and are made part of the RFP.
- Appendix N - Requirements Matrix contained some locked fields that required entry. The fields have been unlocked in the revised Appendix N, which has been attached to this Addendum 2 and made part of the RFP.
- Appendix F – Cost Submittal contains a few cells (G89, E91, G93, G98) that appear to be formatted with three decimal places and some fields were not large enough to accommodate larger numerical numbers. The corrections have been made to the revised Appendix F – Cost Submittal, which has been attached to Addendum 2 and made part of the RFP.
- For informational purposes only, the following attachments and are attached to this Addendum 2.
 - The Pre-Proposal PowerPoint presentation
 - Business cards of the attending suppliers

Type of Solicitation: Hard Copy (Paper) Bid - If you have already submitted a response to the original solicitation, you may either submit a new response, or return this Addendum with a statement that your original response remains firm, by the due date.

Except as clarified and amended by this Addendum, the terms, conditions, specifications, and instructions of



pennsylvania
DEPARTMENT OF GENERAL SERVICES
BUREAU OF PROCUREMENT

the solicitation and any previous solicitation addenda, remain as originally written.

Respectfully,

Name: Jennifer Habowski
Title: Issuing Officer
Phone: 717-703-2937
Email: jhabowski@pa.gov

ENVIRONMENTAL CLAIMS ADMINISTRATION AND ASSOCIATED TECHNICAL SERVICES
PRE-PROPOSAL CONFERENCE - 6100024372

April 11, 2014

PA Department of General Services / Bureau of Procurement
 Forum Place, 6th Floor, CR 1
 555 Walnut Street
 Harrisburg, PA 17101

SIGN-IN SHEET

COMPANY NAME	ADDRESS	REPRESENTATIVE/TITLE	PHONE	EMAIL
PA INS. DEPT	CAB BUILDING	Steve J. Hanna	787-6609	shanna@pa.gov
CPW - PMO	STEAKS Bldg SR	Ken Ketch	783-2128	ketch@pa.gov
PID	CAB Bldg	Rick Burman	787-6093	Rburman@pa.gov
FROM Henry Duck	Campkin	H. Duck	717 883 5911	hduck@streamsystems.com
David Bluff	Cre 1	DJ Co	410 614 1308	crewhor@lookraf.com
ANDREW MALLON	213 MARKET ST HCR	CTO PLISA	717 237 6748	Amallon@PL-SA.com
Navigant Cons. Hng	30 S Water Dr. #3100 Chicago IL 60606	Adam Jones Sr. Consultant	317-217-5347	adam.jones@navigant.com
Daniel Semon	110 SENSEY AVE KING PA 17112	Credentechology Solutions Daniel Semon Business Development	217-818-8854	Dsemon@credentech-solutions.com
Rolls-Robbe Saltys	213 MARKET ST ALB PA 17101	DR ROLL Product	717 231-4441	droll@roll-s-a.com
PLSPA	213 market st HRG PA 17101	Blair Juffs DEEP	717-237-6716	gungu@pl-s-a.com
Skelly Tagline Inc	449 Eisenhower Blvd Harrisburg, PA 17111	Mark B. Toos	717-333-0593	miss@skellytagline.com
ICF	400 Limes St Middletown PA 17057	Senior Associate Seminor Project	717-942-1725	belinda@icf.com
ICF	4000 JIMMY M. ZIMMERMAN PA 17057	Senior Manager SR	717-948 1761	Kerry.Yount@icf.com

OFFICIAL QUESTIONS / ANSWERS

4/18/2014

Environmental Claims Administration Associated Technical Services RFP 6100024372

Question #	RFP Page #	RFP Section Reference	Question	Answer
	(If Known)	(If Known)	(Required)	(Required)
1			<p>1. Are any firms eligible to bid on that or is it restricted to only those vendors on some sort of pre-approved vendor listing?</p> <p>2. Was it released to only those vendors under a particular ITQ – if so which ITQ?</p>	<p>1. Anyone who meets the requirements of the Request for Proposal, may submit a proposal.</p> <p>2. This is an Request for Proposal that was publicly posted to the web. Your company may have received notification through one of the e-alerts your company is set-up for.</p>
2	11	II-4	<p>Section II-4, Prior Experience, refers (at the top of page 11) to a survey that references will be asked to complete, but there does not appear to be a request in the RFP to provide references. Please clarify.</p> <p>If the Commonwealth is requesting that Offerors provide references, please indicate the number of references each Offeror is to provide.</p>	<p>Offerors will not submit a list of references with their proposal. Offerors who submit proposals will be expected to utilize eVendorCheck, an online, easy to use, reference checking process (www.evendyorcheck.com). Your references (4-5 references from 4-5 of your current customers) will complete a brief, 30 item confidential survey that takes 5-8 minutes, rather than being contacted by phone. Offerors who submit proposals will receive an email with further instructions detailing how to enter their references into the eVendorCheck system.</p>
3		Appendix F & Sections IV-2.A.3 and IV-4.J of the RFP	<p>Item 1(d) on the Environmental Claims Administration and Associated Technical Services sheet of Appendix F instructs the Offeror to provide a monthly fee for record retention. Based on RFP sections IV-2.A.3 and IV-4.J, it appear that PAUSTIF intends for the record retention fee to cover storage of hard copy and electronic records. However, the RFP does not appear to indicate the quantity of records to be stored at the outset of the contract or the anticipated increase in the quantity of records over time. We suggest that the instructions be revised to request Offerors to quote a monthly price per unit (i.e., per box of hard copy records) for records retention (which is how records management vendors typically quote prices) for a PAUSTIF-estimated number of units to be stored per month for bidding purposes. Such an approach would be analogous to the approach specified by PAUSTIF for pricing imaging services. Also, we further suggest separate pricing for retrieving and returning records from/to storage because additional charges are normally associated with these activities.</p>	<p>The normal workflow for record retention of the hardcopies of incoming mail would be as follows: the items are scanned and then the imaged versions are routed to the appropriate personnel. By viewing the images, personnel would discover if any hardcopies would need to be re-scanned. After 90 days of being readily available on-site, the hardcopies would be discarded. Offerors will be responsible for the cost of maintaining 90 days worth of records within their office space. To obtain a rough estimate of what this would represent, from November 2010 through March 2014, incoming mail resulted in about 518 boxes of records. However, due to a pending legal matter, we are retaining all hardcopies until we receive word from the court that we may discard them. After 90 days we now move the incoming mail hardcopies from the vendor's offices to space at an Iron Mountain facility in Middletown for which USTIF pays for directly. Also, there are about 1,650 to 1,750 boxes of older records that have not been scanned into the current imaging system also located at Iron Mountain and also paid for directly by USTIF. Item 1(d) is for use if the Offeror elects to use a storage facility other than Iron Mountain but is more logical due to where the Offeror's offices will be located. Monthly activity charges for five (5) retrievals and five (5) returns should be included in the Offeror's cost submittal.</p>
4			<p>How many PAUSTIF or other Commonwealth agency personnel, if any, should be assumed to be users of each required IT system for pricing?</p>	<p>Claims System - 12 users. Imaging System - 20 users. Fee Billing System - 12 users. Data Management System - 20 users. Web Site - 20 Commonwealth users, 400 distributors, 4,000 tank owners and tank installers will all have the ability to create a secured login. Public or general visits not using a secured login cannot be estimated at this time</p>
5		Appendix F	<p>Appendix F includes a few cells (G89, E91, G93, G98) that appear to be formatted with three decimal places. Upon entering data, the cell width for G98 is not enough to view the numbers, so they appear as # signs. The spreadsheet is "read-only", so we are not able to adjust the formatting. Please adjust the spreadsheet.</p>	<p>The forementioned cells in Appendix F - Cost Submittal will be resized. A revised version of Appendix F will be posted to the web as part of an Addendum.</p>
6			<p>Is there a need for mobile capabilities for this bid? If so what piece? Target Platform (IOS, Android)?</p>	<p>At this time, there is no need for mobile capabilities.</p>

OFFICIAL QUESTIONS / ANSWERS
Environmental Claims Administration Associated Technical Services
RFP 6100024372

4/18/2014

Question #	RFP Page #	RFP Section Reference	Question	Answer
	(If Known)	(If Known)	(Required)	(Required)
7			Is it possible for potential bidders to view a copy of the current ICF contract or the current rate schedule is that ICF is using? Also, how much was paid to ICF in the most recent full contract year?	Yes, the current contract is available on the PA Treasury website, select e-contracts and search by Contract # 4300091918 . For the contract year July 1, 2012 through June 30, 2013, ICF was paid a total of \$3,852,831.
8			In what level of detail are invoices submitted by UST owners being reviewed? Are the invoices being reviewed by technical personnel in addition to the claim representatives? Is a fee scheduled utilized to determine cost effectiveness?	Invoices submitted by environmental consultants engaged by UST owners or operators are very detailed and must include itemized breakdowns for all time and materials being billed. The statutory guidance is "reasonable and necessary" expenses related to the remediation. The selected Offeror's task is to validate that the tasks invoiced represent work performed and relevant to the project (claim specific) and compare to costs and tasks typically see within the marketplace (industry specific). Claim specific and industry specific reviews will most likely involve technical as well as claim personnel. Review may include supporting documents, such as time sheets and invoices for materials purchased from third parties. USTIF has no published fee schedule. Should a fixed price contract be put into place, payments are made upon satisfaction of pre-determined milestones and no itemized invoices are submitted nor reviewed.
9			What role will the contractor play in the invoice payment process to UST owners? How will the contractor interface with state accounting personnel to ensure payments are made appropriately?	The selected offeror is responsible for reviewing and recommending for payment (or deduction) all items on all invoices received. USTIF approval is required for items exceeding an established dollar amount. The selected offeror will be required to establish an interface with the Commonwealth Comptroller's Office for invoice processing / accounts payable.
10			Are there geographic restrictions on where any portion of the work must be performed? If not, how is it envisioned that the contractor obtain necessary claim materials from the state?	No geographic restrictions are stated in the RFP, however a local office would be practical as face-to-face meetings will be required as needed, especially during the transition activities. The selected offeror will also be expected to host bid review meetings at their offices and attend quarterly USTIF Board meetings that are held in Harrisburg. Materials will be made available to all appropriate parties through use of the imaging system.
11			How many invoices are taken in and processed each month?	For the first quarter of 2014, the average number of invoices processed was about 800. However, the number of invoices may not be that relevant, but rather the number of line items on each invoice. Invoices can range substantially in complexity and dollar value. It is safe to say that invoice review and approval is a major activity and may involve input at various levels of management at the selected offeror and USTIF.
12		Appendix D	How many claims are assigned to each adjustor?	The RFP materials (see Appendix D - Personnel) provide the maximum allowable claims to be assigned to each adjustor.
13			Could you please advise if Fund has an anticipated start date of this contract that we could use for proposal and planning purposes?	The Commonwealth anticipates to have a fully-executed Contract by the end of July.



Pre-proposal Conference Environmental Claims Administration & Associated Technical Services RFP 6100024372

**Issuing Officer: Jennifer
Habowski**

April 11, 2014

1:30 pm



- Introductions
- Housekeeping
- Supplier Support
- Background
- Bureau of Small Business Opportunities (BSBO)
- RFP Requirements
- Review of Submitted Questions and Answers
- Additional Questions and Answers



- **Department of General Services**

- Rich Gaul, Commodity Manager
- Gayle Nuppnau, BSBO, Procurement Liaison

- **Department of Insurance**

- Steve Harman, Director of the Bureau of Special Funds
- Rick Burgan, USTIF Claim Manager

- In the event of a fire drill:
 - Exit building via stairs
 - Cross Walnut Street
 - Gather in grass at Forum Building
- Restrooms through secure door to the left
- Sign attendance register
- Provide business card
- Sign-in sheet will be posted to eMarketplace
- Blank question sheet

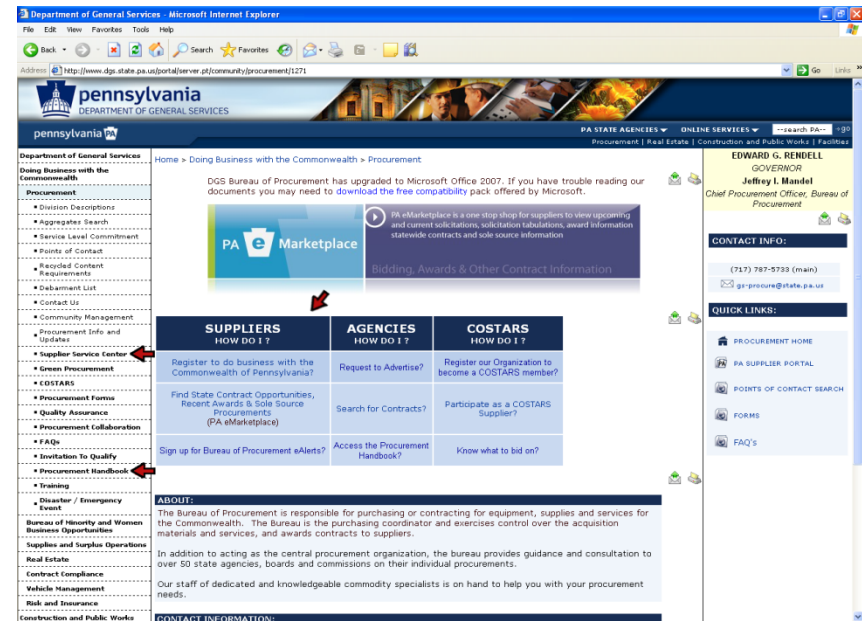


www.eMarketplace.state.pa.us

Your Gateway to All Procurement Information

Links to:

- **Supplier Service Center**
- **PA e-Marketplace**
- **PA Supplier Portal**
- **Procurement Handbook**

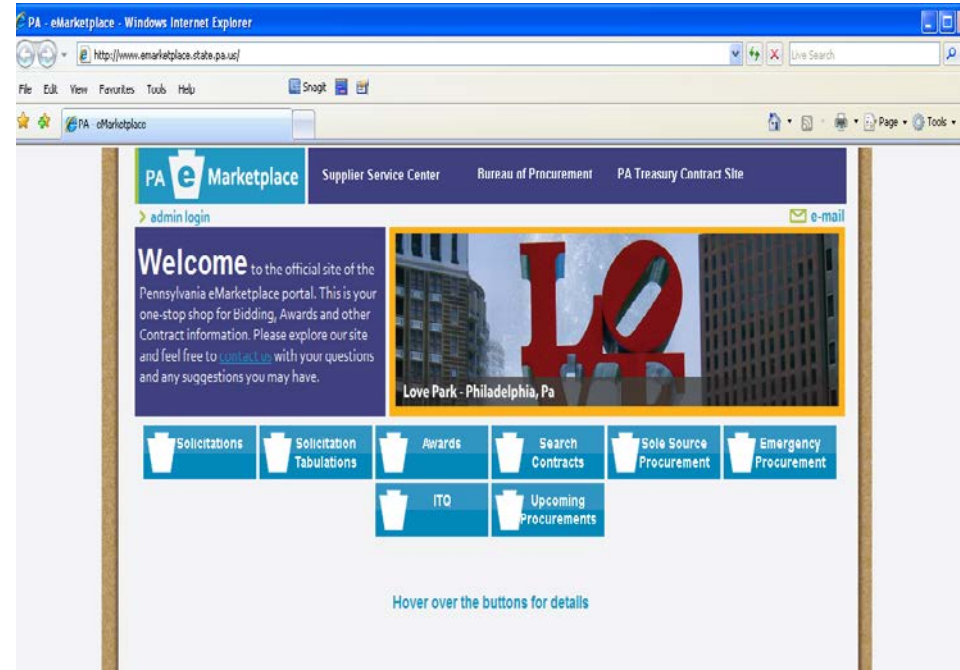




www.eMarketplace.state.pa.us

Your Gateway to Contract Information

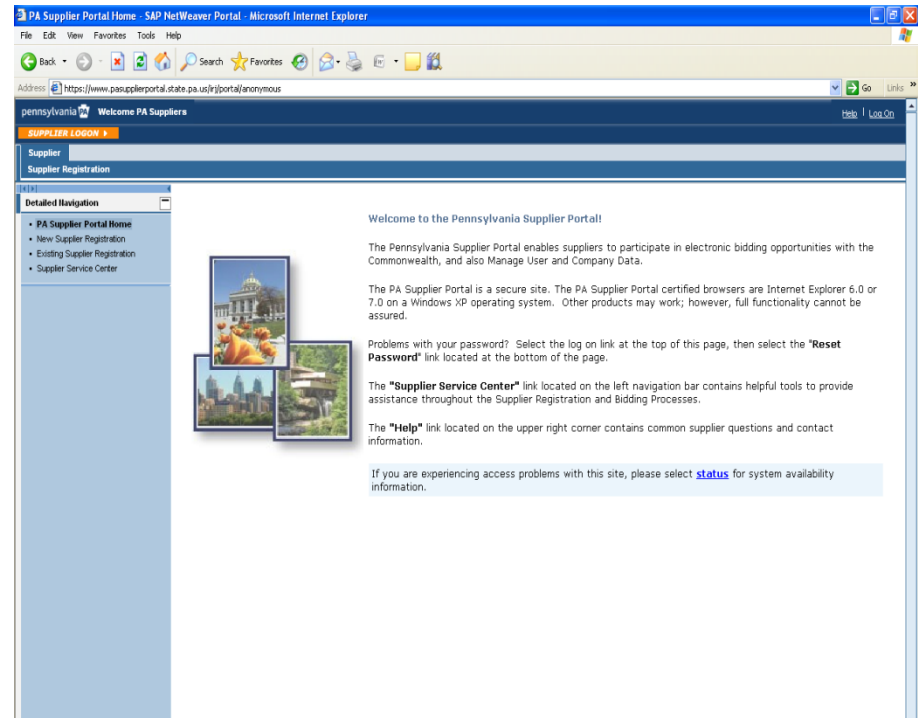
- **Solicitations**
- **Tabulations**
- **Awards**
- **Contracts**
- **Sole Source**
- **Upcoming Procurements**
- **Links:**
 - **Supplier Service Center**
 - **Treasury Contracts**



www.pasupplierportal.state.pa.us

Your Gateway to Procurement

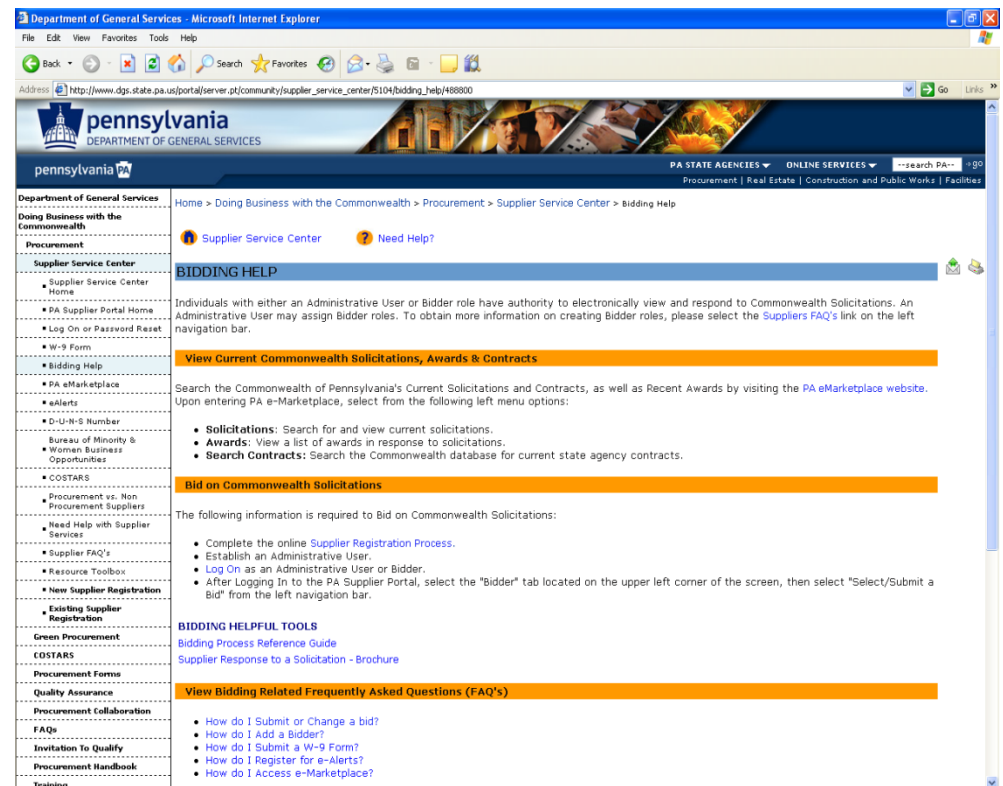
- **New Supplier Registration**
- **Manage company data**
- **Link:**
- **Supplier Service Center**



Supplier Service Center

Resources

- Frequently Asked Questions
- How to Register
- E-Alerts
- COSTARS
- Reset Password
- Resource Toolbox
 - Brochures
 - Guides



Telephone - Toll Free: 877-435-7363

Telephone - Harrisburg: 717-346-2676

Web: www.pasupplierportal.state.pa.us

e-Mail: RA-PSC Supplier Requests@pa.gov

- **Vendor Registration Guide**
- **Bidding Reference Guide**
- **eAlerts**
- **W-9 Form**



In the 1980's the EPA adopted regulations that establish financial responsibility requirements for underground storage tank owners or operators in the event of a release from a tank. In 1989, the Pennsylvania legislature passed The Storage Tank and Spill Prevention Act that created Underground Storage Tank Indemnification Fund (USTIF) to assist tank owners and operators in meeting the financial responsibility requirement. USTIF collects fees and makes reimbursement payments to eligible owners and operators for damages caused by a release from their underground storage tank.

The selected Offeror will provide quality, effective and efficient environmental claims administration services, along with supporting workflow management and other software solutions to USTIF.

The solution shall include the five primary services being requested through this RFP: 1) Claims Administration 2) Fee Billing and Collection, 3) Imaging, 4) Web Hosting, and 5) Data and Workflow Management.



Background continued

- **Current Contract Information:**
 - Current Vendor: ICF
 - Contract Number: 4400002415
 - Spend: \$19.6 million (from 7/1/2007 thru 6/30/2013)

- **Term of New Contract:** 5 years with an additional 5 one-year renewal terms



Bureau of Small Business Opportunities (BSBO)

Gayle Nuppnau

DGS, Procurement Liaison

Small Diverse Business Program (SDB)

Program designed to encourage participation of Small Diverse Businesses (SDB) in state contracting

Program designed to encourage participation of Small Diverse Businesses (SDB) in state contracting

- A Small Diverse Business is a DGS-verified minority-owned business, woman-owned business, veteran-owned business or service-disabled veteran-owned business.
- A small business is a business in the United States which is independently owned, not dominant in its field of operation, employs no more than 100 full-time or full-time equivalent employees, and earns less than 7\$ million in gross annual revenues for building design, \$20 million in gross annual revenues for sales and services and \$25 million in gross annual revenues for those businesses in the information technology sales or service business.



To receive credit for being a Small Diverse Business or for subcontracting with a Small Diverse Business (including purchasing supplies and/or services through a purchase agreement), a Offeror must include proof of Small Diverse Business qualification in the Small Diverse Business participation submittal of the proposal, as indicated in section II of the RFP.

- Copy of verification letter
- Small Diverse Business (es) must be named including address and phone
- Letter of intent that specifies the type of goods or services the small diverse business will provide along with percentage of commitment
- All Offerors must include a numerical percentage which represents the total percentage of the work (as a percentage of the total cost in the Cost Submittal) to be performed by the Offeror and not by subcontractors and suppliers
- All Offerors must include a numerical percentage which represents the total percentage of the work (as a percentage of the total cost in the Cost Submittal) to be performed by the Small Diverse business as subcontractors



Contact Information

Bureau of Small Business Opportunities (BSBO)

Ms. Gayle Nuppnau

Procurement Liaison

Telephone: (717) 346-8105

E-Mail: gnuppnau@pa.gov

The proposal shall consist of **three** separately sealed submittals:

Technical Submittal

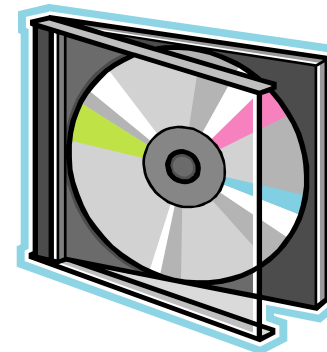
(7 paper copies with 1 copy marked “Original”)

Cost Submittal (1 paper copy); and

Small Diverse Business Submittal

(2 paper copies)

Include CD/Flash drive of **complete and exact** copy of each entire proposal



CD

OR



Flash Drive

*** In accordance with Part I-19 of the RFP - If claiming confidential proprietary information, or trade secrets (Appendix B), include a redacted version of the proposal along with a signed written statement on the CD or Flash Drive clearly marked “REDACTED”.**



PAPER SUBMISSION

(hand carried or mailed) by **May 2, 2014 at 3:30 pm EST**

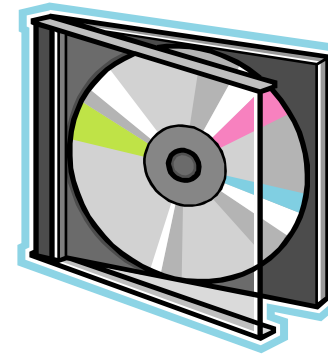
**PA Department of General Services
Bureau of Procurement
Attn: Jennifer Habowski/RFP 6100024372
555 Walnut Street
Forum Place, 6th Floor
Harrisburg, PA 17101**

- * Late Submittals will automatically be rejected**
- * If using Fedex, allow an extra day or two**



Offeror's Technical Submittal

1. **Appendix A** - Proposal Cover Sheet
2. **Narrative Response** to RFP Part II-1 through II-8
***Part II-3 (Work Plan)** – Describe in narrative form your technical plan for accomplishing the work. Use **Part IV** of the RFP as reference.
3. **Appendix B – Trade Secret From** (if redacted proposal is provided)
4. **Appendix G - Domestic Workforce**



CD

OR



Flash Drive

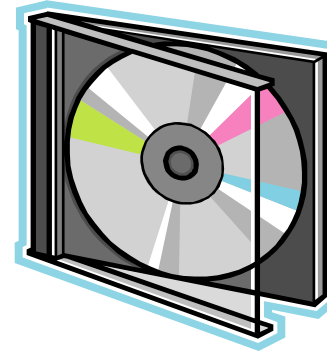
***DO NOT include any cost information in your technical submittal response.**



Offeror's Cost Submittal

Appendix F – Cost Submittal Form

* The Cost Submittal will be evaluated based on the group total comprised of the initial contract term [5 years].



CD

OR



Flash Drive

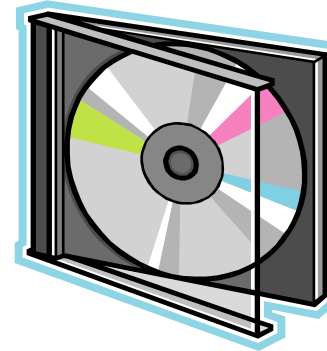
MAKE NO ASSUMPTIONS. If there are any assumptions included in the cost submittal, your proposal may be rejected.



Offeror's SDB Submittal

Narrative Response to RFP Part II-9

1. Appendix E – SDB Letter of Intent



CD

OR



Flash Drive



MANDATORY REQUIREMENTS

- Offerors must attend the Mandatory Pre-proposal Conference in order to submit a proposal.
 - Offerors who attend the Mandatory Pre-Proposal Conference and submit a completed and signed Non-Disclosure Agreement (**Appendix Q – Non-Disclosure Agreement**) for each of the Offeror’s representative who will view the USTIF Claim manual will be provided one business day (7.5 hours) to view the manual. This meeting has been scheduled for:

April 14th from 8:00 am – 3:30 pm
Department of General Services, 555 Walnut Street, 6th Floor
Forum Place, Harrisburg, Pa 17101. Conference Room 1
 - The Non-Disclosure Agreements will be accepted during the Mandatory Pre-Proposal Conference for each of the Offeror’s representative that would like to view the USTIF’s claim manual.
 - The manual shall be considered confidential and shall not be copied or removed from the premises. Note taking is permissible.



MANDATORY REQUIREMENTS - continued

- Proposal must be received by the proposal due date and time.
(Paper Submission)
- Proposal Cover Sheet (Appendix A) must be properly signed by an authorized official that binds Offeror to the provisions contained in their proposal.

CONTRACT REQUIREMENTS

- Must obtain 70% of total available technical points to advance.
- If you specify that the proposal is not firm for the time period 120 days or until a contracted is fully executed, your proposal may be rejected.
- If there are any assumptions included in the cost submittal, your proposal may be rejected.
- If you state that the proposal is contingent on negotiation of Offeror terms and conditions, your proposal may be rejected.



CRITERIA FOR SELECTION

Technical = 50% of the total points

Small Diverse Business = 20% of the total points

Cost = 30% of the total points

Bonus Points: Domestic Workforce Utilization



- Review of Questions
- Additional Questions

**ALL questions
must be in
written form...**

**Blank question
sheets are
available at the
Sign-In Desk.**





Answers provided today are considered unofficial and not binding.

All questions and responses will be posted on the
DGS Emarketplace Website:

<http://www.emarketplace.state.pa.us>

All Commonwealth responses are not official until they are confirmed in writing and posted to the eMarketplace website as an Addendum to the solicitation.



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Principal

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Professional Geologist

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Cell: 717-576-4963