Information Technology Support and Services for the Department of Public Welfare

RFP #16-09

Issuing Officer: Kay Shaffer

Pre-Proposal Conference

07/16/2010

Introductions

- Kay Shaffer – Issuing Officer
- Terry Shuchart –Chief Information Officer
- Gayle Nuppnau – DGS, BMWBO
- Marcellus Simmons – Contractor Partnership Program
- Reggie Williams – Mentor Protégé Program

Agenda

- Housekeeping/Ground Rules
- Information Concerning Small Business Enterprises
- Information Concerning Contractor Partnership Program
- Information Concerning Mentor Protégé Program
- Supplier Development and Support
- Purpose of Today's Meeting
  - Background Leading to the Issuance of this Request for Proposals
  - Project Overview
  - Critical Points in the RFP
  - Requirements of the RFP
  - To answer your questions concerning the RFP
- Project Timeline
- Preliminary Answers to Questions
- Adjourn

Housekeeping/Ground Rules

- Emergency Exits
- Restrooms
- Offerors will submit their questions in writing to the Issuing Officer at the break or at the end of the conference.
- No answers are official until confirmed in writing and posted to the DGS website

Bureau of Minority & Women Business Opportunities

- Participation encouraged
- Disadvantaged Business Submittal
- Enterprise Zone Small Business

PA DEPARTMENT OF PUBLIC WELFARE

Contractor Partnership Program

What is the Contractor Partnership Program?

- The Contractor Partnership Program (CPP) was created by Pennsylvania's Department of Public Welfare (DPW) to create additional employment opportunities within the Commonwealth.
- CPP is designed to leverage the economic resources of DPW to create jobs for individuals currently receiving TANF cash assistance by maximizing the recruitment, hiring and retention of those individuals by Commonwealth contractors, subcontractors and grantees.

Who's required to participate in the program?

– All contractors, vendors, organizations, fiscal agents, county governments etc. that receive funding (25,000 or more) from the Department of Public Welfare (DPW) or a DPW funded initiative in the form of a contract, grant, memorandum of understanding or other contracting vehicle

What are the responsibilities of the Contractors?

– To fill new or vacant positions with qualified individuals receiving TANF cash assistance

How do contractors identify qualified candidates?

- **Contractors can partner with the local service delivery providers in their area; the Workforce Investment Agency (WIA) or Community Action Agency Program (CAAP)**
- **Contractors can also work with faith based organizations, host targeted job fairs, post advertisements via newspapers or internet**

Where are candidates located?

- CPP works with individuals throughout the Commonwealth of Pennsylvania

(Note: Contact CPP to locate an agency within your area)

What organizations have hired individuals through the Contractor Partnership Program?

- Educational Data Systems Incorporated
- Keystone Mercy
- Ameri Choice
- Logisticare
- University of Pittsburgh Medical Center
- Health Partners
- Community Behavioral Health
- Multiple County Commissions statewide

What type of positions are typically filled by CPP applicants?

- Outpatient Case Manager
- Customer/Member Service Representative
- Data Entry Clerk
- Help Desk Operator
- Administrative Assistant
- Certified Nursing Assistants

- Receptionist
- Janitorial
- Call Center Operator
- Care Manager
- Security
- Outreach Coordinator
- Home Health Aides

What are the reporting requirements for CPP?

- **Within 10 days of receiving the notice to proceed, Contractors must register in the Commonwealth Workforce Development System (CWDS). In order to register the selected contractor must provide business, location and contact details by creating an Employer Business Folder/Company Profile for review and approval, within CWDS at HTTPS://WWW.CWDS.State.PA.US.**

- **Contractors are required to complete and submit the PA 1540 Quarterly Employment Report Form on a quarterly basis to document the number of TANF cash assistance recipients hired for that quarter.**

- **The form must be completed in its' entirety and forwarded to the Contractor Partnership Program by the fifteenth day of the following month after the quarter ends. If the 15th falls on a weekend or state holiday the report is due the next business day.**

- **A copy must also be sent to the DPW Project Officer**

What are the reporting requirements for CPP?

Cont.

- **All Contractors, regardless of their contract start date, must submit the PA 1540 based on the schedule below. If a contract begins in the middle of a quarter the information reported will be based on activity that occurred from the contract start date through the end of the quarter.**

- **If no activity occurred the form must be completed by stating "No Activity in this Quarter with the Contractor's comments. This report must be signed by the entity that holds the contract with the DPW; it <u>may not</u> be signed by a subcontractor.**

- **The information submitted on this report will be audited for its' accuracy and the findings will be utilized to determine if the Contractor is meeting its' hiring requirements as noted in the contract.**

CPP Reporting Schedule

- The quarters are based on the Department of Public Welfare's fiscal year and are as follows:

Quarters	Begin Date	End Date	Reports Due
1– First	July 1	September 30	October 15
2– Second	October 1	December 31	January 15
3– Third	January 1	March 31	April 15
4– Fourth	April 1	June 30	July 15

What are the benefits for hiring via CPP?

- Contractor can utilize PA's vast Employment & Training Network to assist in training, hiring and retention at no cost
- Contractors may be eligible for tax credits for hiring individuals receiving cash assistance
- It depends on the specific profile of the individual candidate

  – Information on tax credits can be found at: http://www.dli.state.pa.us (Search for Work Opportunity Tax Credit) or call 1-800-345-2555

For Additional Questions and Information

PA Department of Public Welfare

Office of Income Maintenance – BETP

Contractor Partnership Program

Health & Welfare Building

7th & Forster Streets, 2nd Floor West

Harrisburg, PA 17105

Phone: 1-866-840-7214

Email: RA-BETPCPP@state.pa.us

Mentor Protégé Program

Priorities of Small Business Mentorship at DPW

- Maximize DPW resources through collaborative partnerships with our contractors
- Introduce capacity building support to sustain the growth of minority and women owned enterprise

Mentor Protégé Program

Priorities of Small Business Mentorship at DPW

- ✓ Stimulate the economy through small business job creation
- ✓ Generate added value in the contracting process to further support the citizens of the Commonwealth

Mentor Protégé Program

Mentor Protégé Action Planning to Support Your RFP Response

1. Adopt the Mentor Protégé Program to provide a competitive advantage in your response
2. Appoint a staff person who will drive this initiative internally

Mentor Protégé Program

Mentor Protégé Action Planning to Support Your RFP Response

3. Seek guidance from the BEO Team in developing your plan
4. Follow the MPP checklist outlined in the RFP

Supplier Development and Support

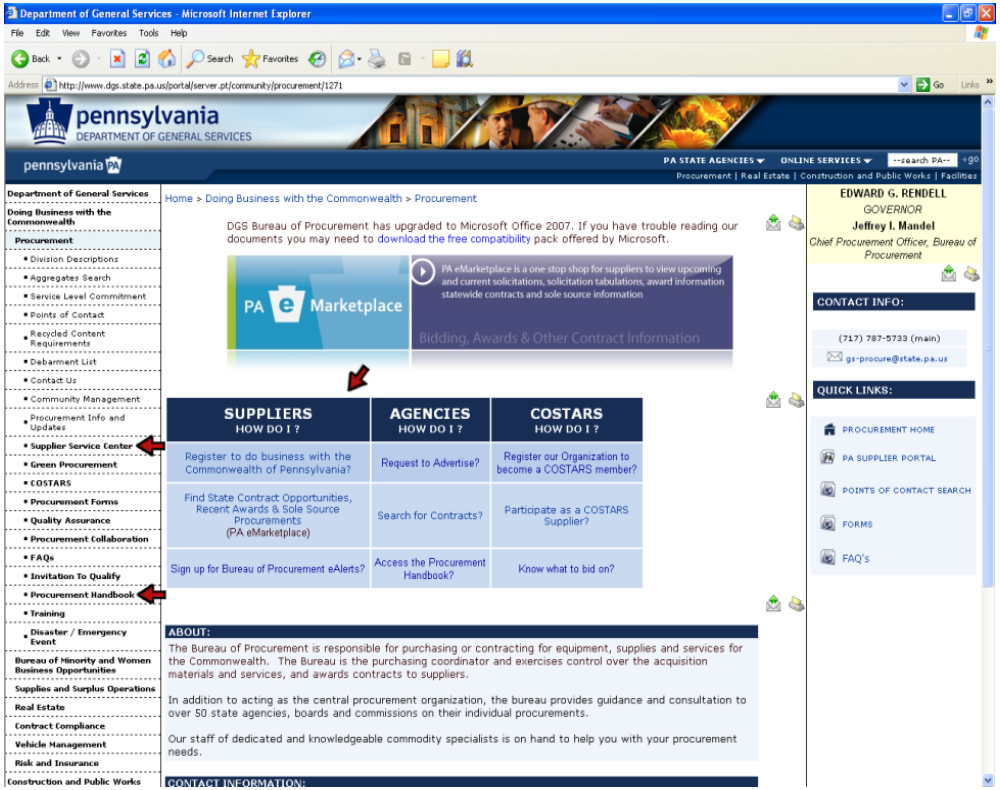
Bureau of Procurement

www.dgs.state.pa.us/procurement

Your Gateway to All Procurement Information

Links to:

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



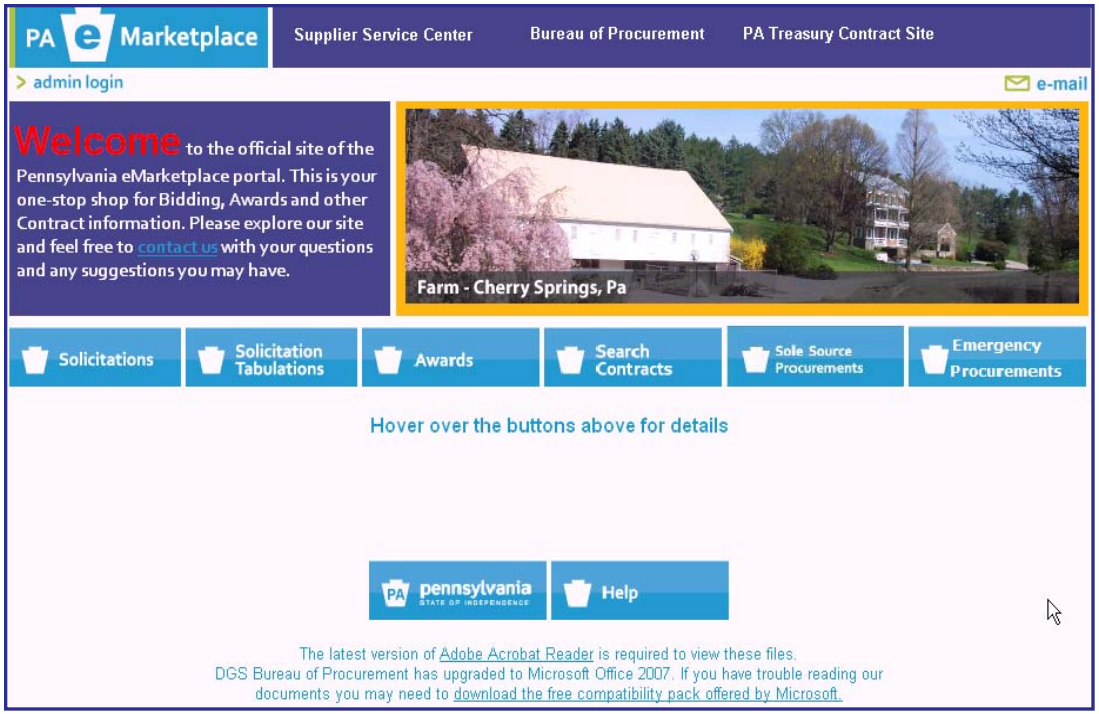
www.eMarketplace.state.pa.us

Your Gateway to Contract Information

- Solicitations
- Tabulations
- Awards
- Contracts
- Sole Source
- COSTARS

Links:

- Supplier Service Center
- Treasury Contracts



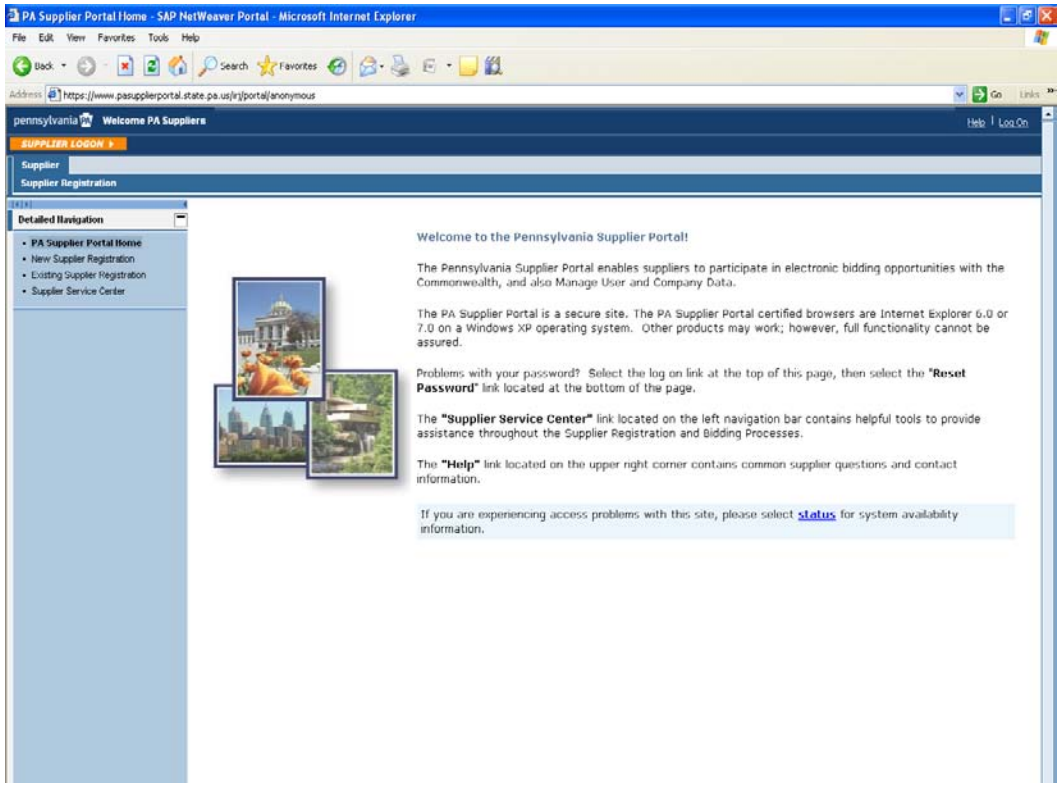
www.pasupplierportal.state.pa.us

Your Gateway to Procurement

Registration

Manage company data

Link: Customer Service Center



Supplier Services Center

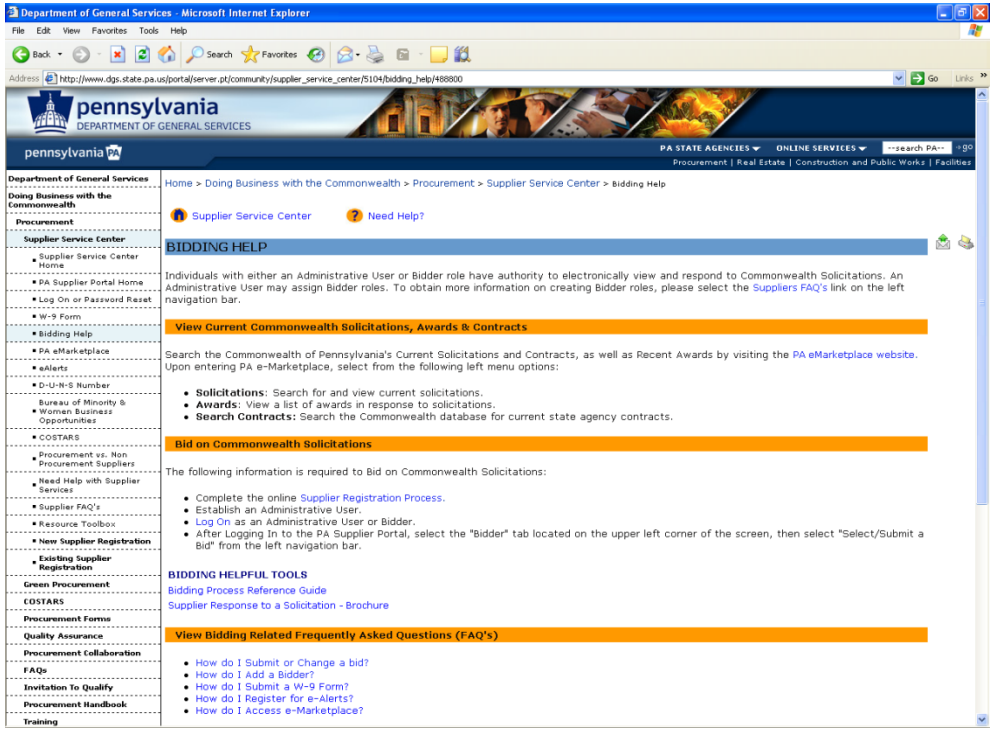
Your Gateway to Supplier Help

How to:

- register
- add users

Resource toolbox:

- bidding guide



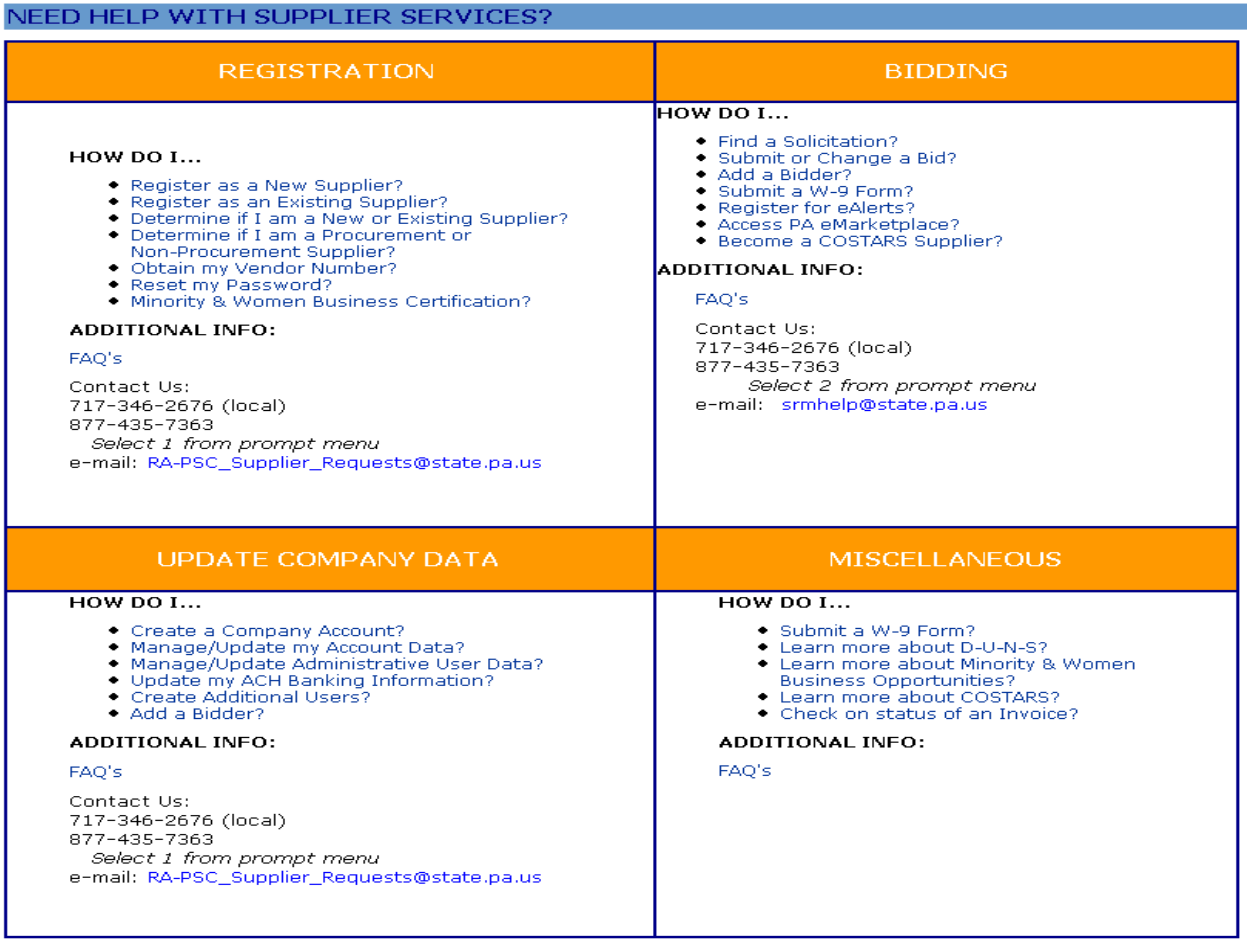
Supplier Services Center

FAQ's

Registration

Bidding

Account Information



NEED HELP WITH SUPPLIER SERVICES?

REGISTRATION	BIDDING
HOW DO I... • Register as a New Supplier? • Register as an Existing Supplier? • Determine if I am a New or Existing Supplier? • Determine if I am a Procurement or Non-Procurement Supplier? • Obtain my Vendor Number? • Reset my Password? • Minority & Women Business Certification? **ADDITIONAL INFO:** FAQ's Contact Us: 717-346-2676 (local) 877-435-7363 *Select 1 from prompt menu* e-mail: RA-PSC_Supplier_Requests@state.pa.us	**HOW DO I...** • Find a Solicitation? • Submit or Change a Bid? • Add a Bidder? • Submit a W-9 Form? • Register for eAlerts? • Access PA eMarketplace? • Become a COSTARS Supplier? **ADDITIONAL INFO:** FAQ's Contact Us: 717-346-2676 (local) 877-435-7363 *Select 2 from prompt menu* e-mail: srmhelp@state.pa.us
UPDATE COMPANY DATA	**MISCELLANEOUS**
HOW DO I... • Create a Company Account? • Manage/Update my Account Data? • Manage/Update Administrative User Data? • Update my ACH Banking Information? • Create Additional Users? • Add a Bidder? **ADDITIONAL INFO:** FAQ's Contact Us: 717-346-2676 (local) 877-435-7363 *Select 1 from prompt menu* e-mail: RA-PSC_Supplier_Requests@state.pa.us	**HOW DO I...** • Submit a W-9 Form? • Learn more about D-U-N-S? • Learn more about Minority & Women Business Opportunities? • Learn more about COSTARS? • Check on status of an Invoice? **ADDITIONAL INFO:** FAQ's

Supplier Support

Customer Services Call Center

717-346-2676

1-877-435-7363

Option 1

Registration
Company Data Updates
ACH Banking Changes
Invoice Payment Status
1099 Questions

Supplier Support

Customer Services Call Center
717-346-2676
1-877-435-7363

Option 2
Searching for Solicitations
Bidding Process
e-Alerts

Proposal Package Notes

ADDRESS PROPERLY

Include
RFP Number
Number Multiple Package
(i.e. 1 of 3, 2 of 3, etc.)
Must be Sealed

Proposals Arriving AFTER Opening Time Will Be REJECTED

Supplier Support

Brochures

Procurement Guide
Doing Business with the Commonwealth

Registration Guide
Registering as a Supplier

Supplier Guide
Locating and Responding to a Solicitation

Background

- RFP #16-05, Application Support Services for DPW's Strategic Business Systems was issued 11/14/2005
- Scope
  - Client Information System (CIS)
  - Child Care Management Information System (CCMIS) – now known as PA Enterprise to Link Information for Children Across Networks (PELICAN)
  - Home and Community Services Information System (HCSIS)
- Required Services
  - Knowledge Transition
  - Project Management
  - Application Support
  - Application Maintenance
  - Application Modifications
  - Turnover
- Contract awarded to Deloitte Consulting for their Integrated Solution Proposal
- Contract ends 6/30/2011

Background - continued

- RFP #39-06, Application Maintenance and Operational Support Services for the PA Child Support Enforcement System was issued 1/8/2007
- Scope - Maintenance and operation of the PACSES core mainframe system and ancillary systems including:
  - Data Warehouse
  - Customer Service web site
  - Case and data management systems
  - Medical provider data management system
  - Intranet
  - Electronic reports repository system
- Required services:
  - Knowledge Transition
  - Project Management
  - Application Maintenance
  - Application Modifications
  - Application Support Services
  - Turnover
- Contract awarded to Deloitte Consulting
- Contract ends 6/30/2011

Background - continued

- RFP #09-07, PA Child Welfare Program Feasibility and Alternatives Analysis issued 1/31/2008
- Scope
  - Determine the feasibility of a Statewide Automated Child Welfare Information System (SACWIS)
  - If a SACWIS was not determined to be feasible, identify and evaluate feasibility and alternatives for other information technology solutions to support PA's child welfare programs
- Contract awarded to Public Consulting Group
- Contract ended September 2009
- It was determined that a SACWIS-solution is not feasible for Pennsylvania.
- The recommended solution is a 'hybrid' approach to include:
  - State-level services,
  - State provided case management (for counties who have nothing or have unsustainable systems),
  - Centralized state database, and
  - A limited number of county interoperable systems.
- Leverages existing assets to expedite solution delivery and decrease development costs.

Background – continued

- RFP #07-07 PA Child Support Enforcement System (PACSES) Feasibility Study and Alternatives Analysis issued 1/22/2008
- Goals of the study included:
  - Review of DPW's current processes to document problems and opportunities for achieving efficiencies
  - Review and update the PACSES functional and technical requirements
  - Identify viable technical alternatives
  - Conduct an alternatives and cost/benefit analysis of the alternatives
  - Develop and recommend a strategic implementation plan for the recommended solution.
- The following options were evaluated:
  - Status Quo
  - Other state Child Support Enforcement transfer systems
  - COTS Frameworks,
  - Custom build an entirely new PACSES system; and,
  - Incremental renewal of the existing PACSES system.
- Contract awarded to SymbioSys Solutions, Inc.
- Contract ended April 2010
- Recommendation
  - to undertake a detailed planning effort to establish a much more specific phased approach than provided in the Feasibility Study.

Background – continued

- Request for Information (RFI)
  - On 3/11/2009 DPW issued a RFI to solicit innovative ideas and new possibilities from the vendor community for the future procurement of IT services included in the scope of the current 'Bundled' contract
  - 8 vendors responded to the RFI
- Input from Federal Programs
- Commonwealth Brainstorming Session
- Request for Information (RFI)
  - On 10/6/09 DPW issued a RFI to solicit public comment on the draft RFP #16-09 Information Technology Services for DPW's Strategic Business Systems
  - 13 vendors responded to the RFI

Project Overview - iCIS

Integrated Client Information System

- iCIS is a collection of systems that are core to DPW's client facing service delivery.
- Provides over $850 million of services and supports a total caseload of approximately 2.5 million recipients of services under various programs such as TANF, Cash Assistance, Food Stamps, Medical Assistance, LIHEAP, State SSI Supplement payments, and State Blind Pension.
- Supports programs run by DPW, Aging, Insurance, Education and Health. Citizens, community partners, and providers access the self service components of these systems to support client needs.
- The system is incrementally being modernized to .NET technology. A key portion of the front-end system was implemented in June 2010.

Project Overview - PELICAN

PA'S Enterprise to Link Information for Children Across Networks

- PELICAN supports early learning programs and promotes quality outcomes for children.
- Provides case and provider management, resource and referral, and financial management services for the Child Care Works program. Primary system used by 59 county CCIS programs encompassing approximately 1200 staff, and over 84,000 providers. More than a quarter of a million transactions are executed daily.
- Allows citizens to search for child care programs via the internet.
- Supports the Child Care provider certification process for licensing child care providers.
- Tracks quality outcome measure to determine the long term effectiveness of various early learning programs.
- Data system to support PA's Early Intervention Program. System will now support children from birth to age 5.

Project Overview - HCSIS

Home and Community Services Information System

- HCSIS provides a full set of case, quality, and financial management services to better serve those citizens who seek home and community based services.
- It serves as a critical operating system for 4 program offices within DPW, 48 county programs, 32 Service Coordination entities, and over 800 providers. More than a quarter of a million transactions are executed daily.
- Although web-based it was build in COM+ and is in the process of being migrated to .NET.
- HCSIS maintains daily interfaces with all key DPW systems and the Department of Aging's Social Assistance Management System (SAMS) for claims processing.
- Major development work in 08-09 to support CMS mandate for moving payments to providers from the counties to the state. Also supporting new Autism Waiver program.

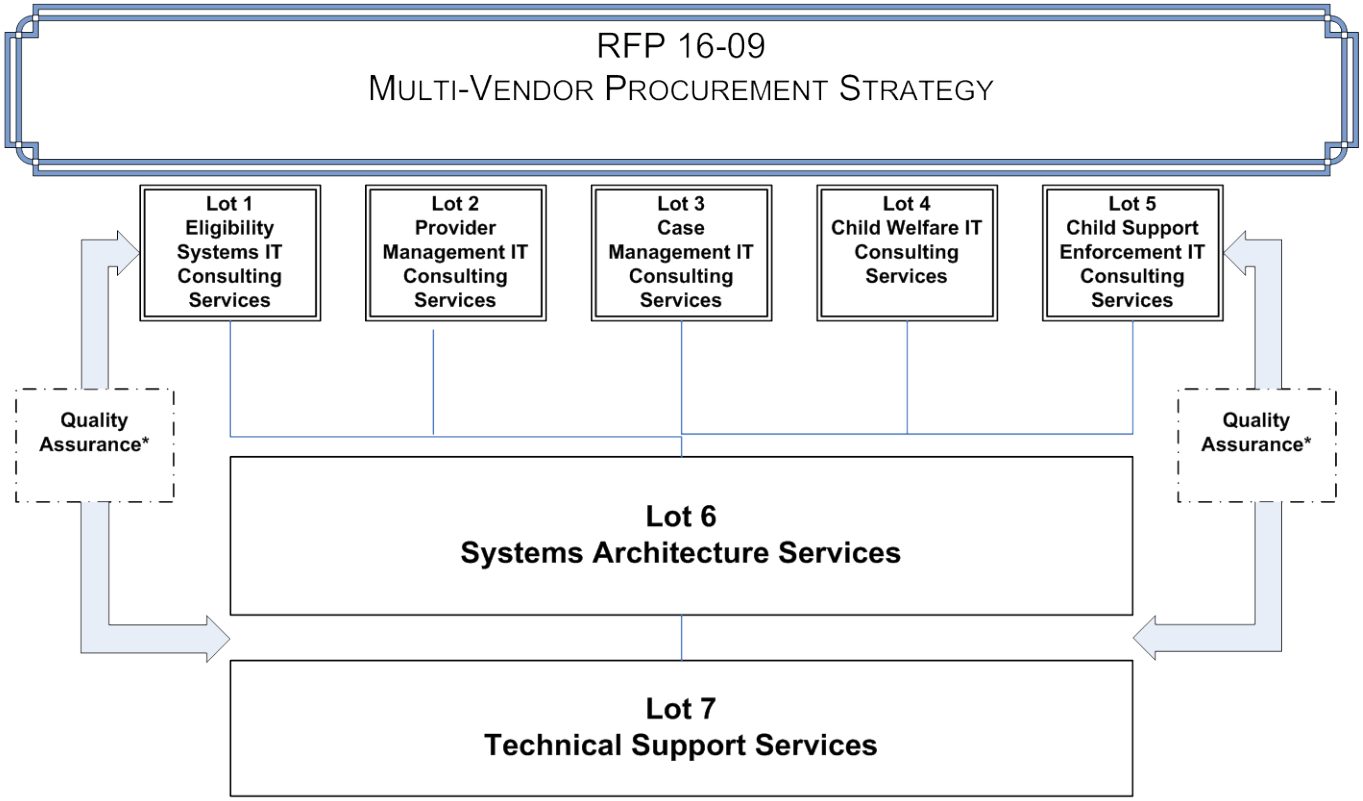
Project Overview – Child Welfare

- Multiple stand-alone systems were implemented to comply with data reporting needs or program monitoring.
- As a state supervised/county administered Child Welfare program, DPW must partner with the 67 county CYAs to fulfill its mission.
- A hybrid approach, leveraging existing assets, has been decided as the long-term solution.

Project Overview – Child Support

- PA's Child Support Enforcement Program is a State Administered, Court Based and County operated program, which is operated through Cooperative Agreements.
- Mandated under Title IV-D of the Social Security Act, P.L. 93-647, as amended, and State Statute, Title 23 Pa C.S. Section 4372
- Full Federal certification achieved in October 2001
- The primary focus of child support rules and regulations since 2002 has been on improving the collection of child support.
- The PACSES application suite requires ongoing modifications to support these business needs.
- The PACSES application suite consists of the core mainframe system and Ancillary Systems.

Multi Sourcing Model



Note

The QA functions will not be included in the scope of RFP 16-09. The QA functions may be performed by state staff or may be a future acquisition (issued as a separate procurement and will be independent from any selected Offerors resulting from this RFP).

Critical Points

- To minimize delays in proposal evaluation and to avoid rejection of your proposal, read the RFP carefully and submit a complete proposal.
- Follow the proposal format given in Part II, Information Required from Offerors, of the RFP using dividers or tabs to separate each section.

Requirements of the RFP We Consider Especially Important

- The resulting contract will be for a term of five years with three 1-year renewal options.
- Use of annual scoping sessions to align DPW business priorities and the Commonwealth's budget process.
- The period from April 1, 2011 through September 30, 2011 has been designated as the Orientation/Knowledge Acquisition period.
- Note: Timeframes given are estimates only and will be heavily impacted by the number of responses received.

Requirements of the RFP We Consider Especially Important

- **Do not include any cost data in the technical portion of your proposal.**
- The proposal must consist of five (5) separately sealed submittals:
  - Technical Submittal
  - Small Business Enterprise Submittal
  - Cost Submittal
  - Contractor Partnership Program
  - Mentor Protégé Program

Requirements of the RFP We Consider Especially Important

- Timely received: Due 08/23/2010 by 2:00 PM EDT
- Signed by an official authorized to bind the company
- Restriction of Contact (I-23) – The Issuing Officer is the sole point of contact for this RFP
- Work Plan (II-3) – Use the requirements in Part IV for your outline, provide detail
- Prior Experience (II-4) –
  - Minimum of three references
  - Accurate contact information for references
  - Notify references in advance

Project Timeline

- 06/22/10 - RFP 16-09 Issued
- 07/16/10 – Pre-proposal Conference
- 07/30/10 - Answers to questions posted
- 08/23/10 - Proposal due date
- August - November 2010 – Proposal evaluation and Contractor selection
- November - December 2010 – Contract Negotiations
- January - March 2011 – Federal & State Approvals
- April 1, 2011 – September, 30 2011 – Orientation/Knowledge Acquisition period
- **Note**: Timeframes given are estimates only and will be heavily impacted by the number of responses received.