OGC-2021-20 - Medical Malpractice Section 715 Defense Counsel

Pre-Proposal Conference

Issuing Officer – Jordan Kiessling





December 22,2021 1:00pm

What's the Point?





Small Diverse Business Enterprise (SDB) and Veteran Business Enterprise (VBE) References:

PART I GENERAL INFORMATION

- I-8 New SDB and VBE Goal Information Session
- I-12. Proposals
- I-13. Small Diverse Business and Veteran Business Enterprise Information

PART II PROPOSAL REQUIREMENTS

- II-3. Small Diverse Business Participation Submittal
- II-4. Veteran Business Enterprise Participation Submittal

PART III CRITERIA FOR SELECTION

- III-1. Mandatory Responsiveness Requirements
- III-3. Evaluation

PART IV STATEMENT OF WORK

■ IV-5. Contract Requirements—Small Diverse Business and Veteran Business Enterprise Participation

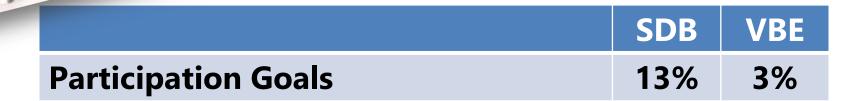
APPENDICES

- Attachment G Small Diverse Business Participation
- Attachment H

 Veteran Business Enterprise Participation

A Bidder/Offeror's failure to meet the SDB participation goal in full and the VBE participation goal in full, or their failure to receive an approved Good Faith Efforts waiver for any unmet portion of either the SDB or VBE participation goal will result in the rejection of the Bid or Proposal as nonresponsive

Solicitation Specific Goals



- Available subcontracting opportunities across the entire state for the applicable services,
- Availability of DGS-verified SDB/VBEs to perform commercially useful functions, and
- Historical analysis of similar projects within the last 3 years.

Primes are welcome to exceed the goal!





SDB and VBE Classification

Vendors must self-certify as a Small Business (SB) prior to SDB/VBE validation.

SB Eligibility Requirements

- The business must be a for-profit, United States business.
- •The business must be independently owned.
- •The business may not be dominant in its field of operation.
- •The business may not employ more than 100 full-time equivalent employees.
- •The business may not exceed threeyear average gross revenues of \$38.5 Million, regardless of business type (effective 11/1/2018).

Small Diverse Business (SDB)

Goal oriented

- Minority Business Enterprise (MBE)
- Woman Business Enterprise (WBE)
- Service-Disabled Veteran Business Enterprise (SDVBE)
- LGBT Business Enterprise (LGBTBE)
- Disability-Owned Business Enterprise (DOBE)

Veteran Business Enterprise (VBE)

Goal oriented

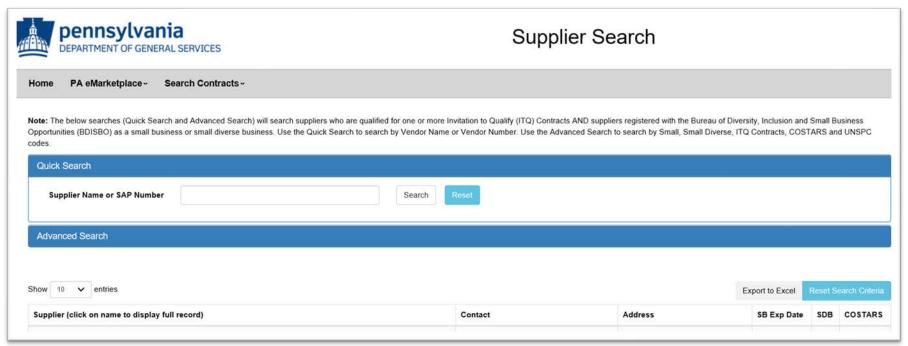
- Veteran Business Enterprise (VBE)
- Service-Disabled Veteran Business Enterprise (SDVBE)

SDBs and VBEs must be certified/valid as of bid close due date and time.



Finding SDBs and VBEs

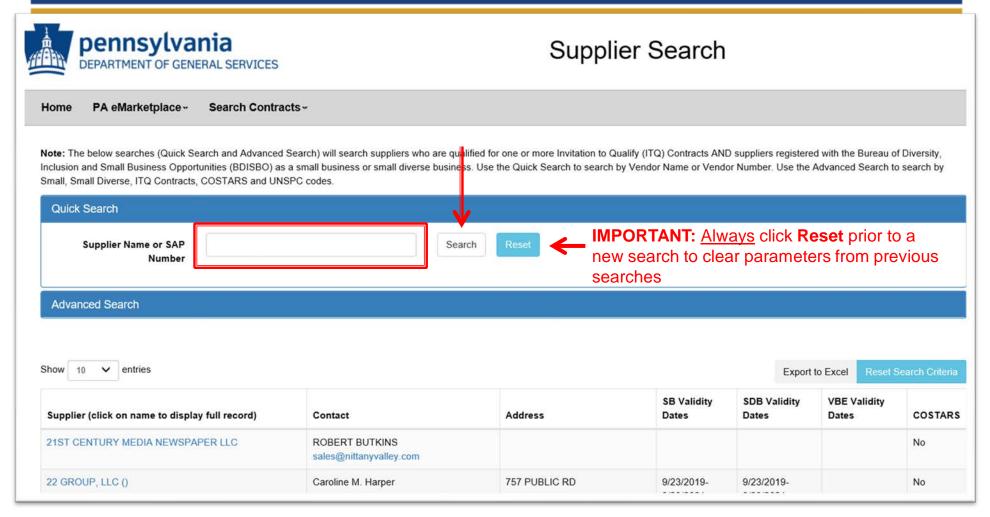
Utilization Compliance will be closely monitored and enforced



http://www.dgs.internet.state.pa.us/suppliersearch



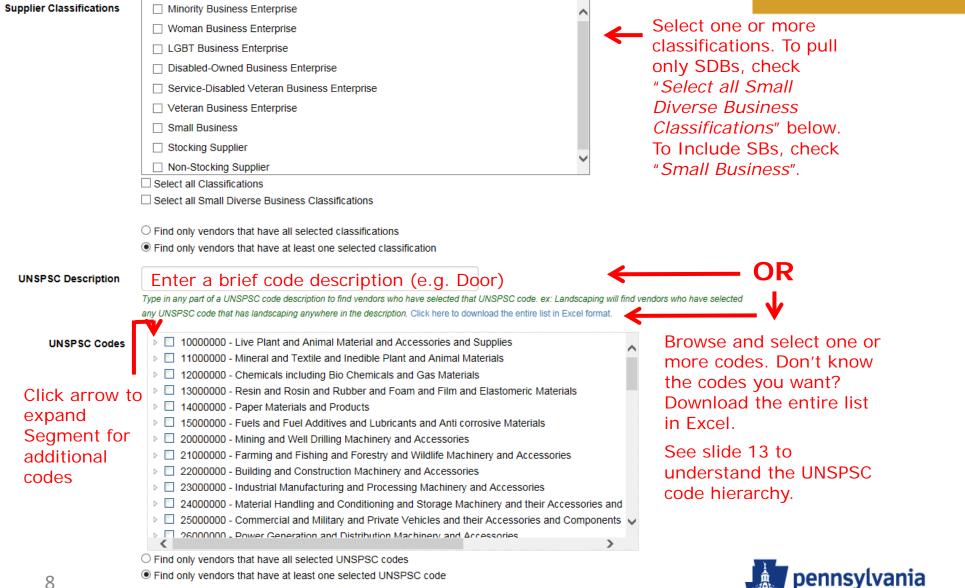
Quick Search



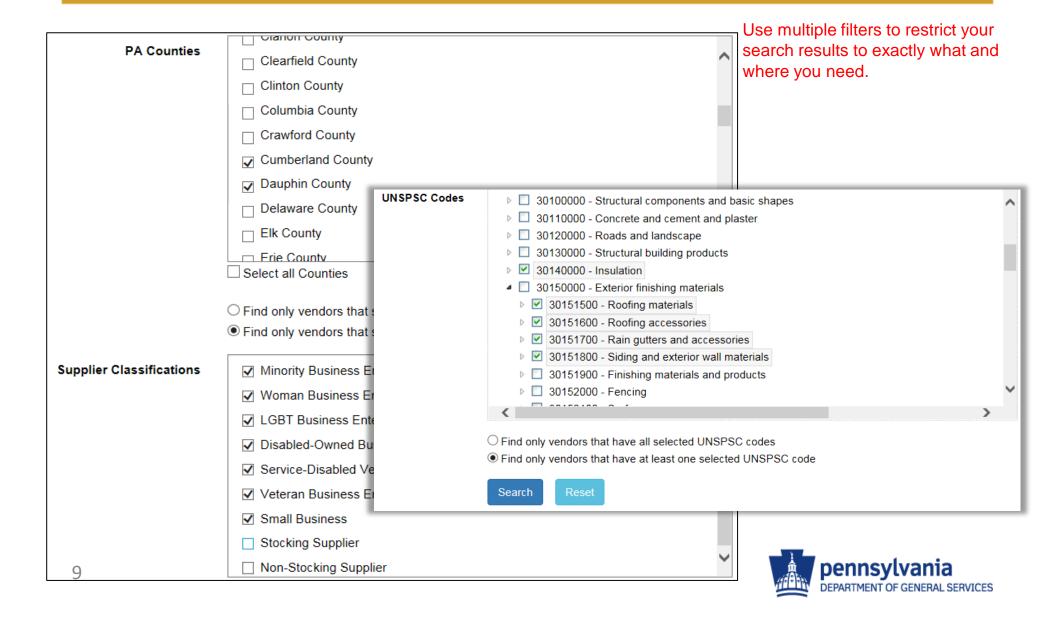
DEPARTMENT OF GENERAL SERVICES

To search or browse ALL Small and Small Diverse
Businesses by Name OR 6-digit SAP Number (option also
available through Advanced Search)

Advanced Search



Advanced Search

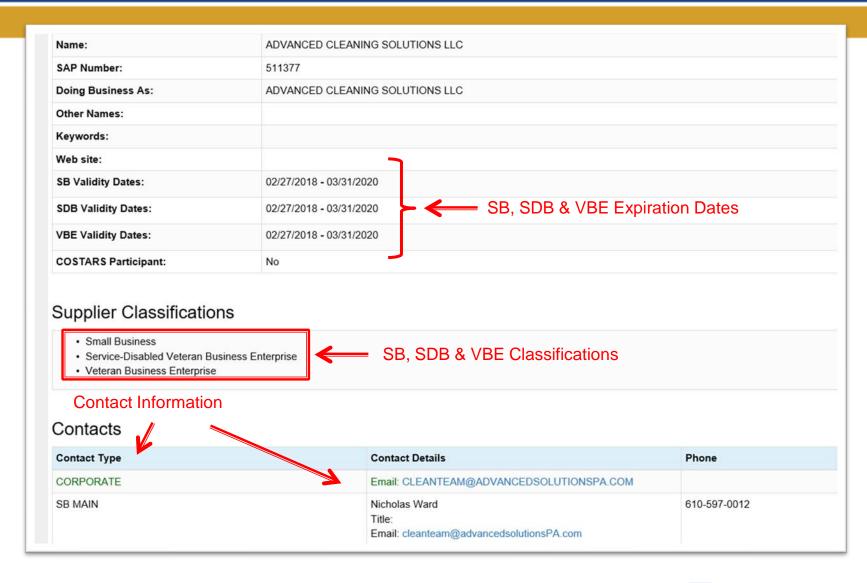


Search Results **Advanced Search** 3how 25 ∨ entries Reset Search Criteria Export to Excel **SB Validity** SDB Validity **VBE Validity** Supplier (click on name to display full record) Contact Address **Dates Dates** Dates COSTARS ADVANCED AUDIO VISUAL SALES INC JOHN GREENE 208 CARTER DRIVE SUITE 7 No DIRECTOR OF SALES WEST CHESTER. PENNSYLVANIA John.Greene@advancedav.com 19382 (Phone) 610-719-6194 (Phone) 610-719-6194 (Fax) 610-692-8421 2/11/2019-ADVANCED BUILDING CONTROLS LLC (DBA Craig Connelly PO BOX 303 No 2/28/2021 ADVANCED BUILDING CONTROLS LLC) CCONNELLY@ADVANCEDBLDGCONTOLS.COM HOLICONG, PENNSYLVANIA 18928 (Phone) 215-520-9964 (Phone) 215-520-9964 11225 HURDLE HILL DR 12/20/2019-12/20/2019-ADVANCED BUILDING PERFORMANCE INC () Pei Pei Cavalier 12/20/2021 12/20/2021 PEIPEI@ABPCX.COM POTOMAC, MARYLAND 20854 (Phone) 301-760-9989 (Phone) 301-760-9989 abpcx.com ADVANCED CLEANING SOLUTIONS LLC 2/27/2018-2/27/2018-Nicholas Ward PO BOX 3223 2/27/2018-No (ADVANCED CLEANING SOLUTIONS LLC) 3/31/2020 3/31/2020 cleanteam@advancedsolutionsPA.com ALLENTOWN, PENNSYLVANIA (Phone) 610-597-0012 **Certified Small Businesses Small Diverse Businesses Veteran Business Enterprise** Advanced Building Controls LLC Advanced Building Performance Inc Advanced Cleaning Solutions LLC Advanced Building Performance Inc Advanced Cleaning Solutions LLC



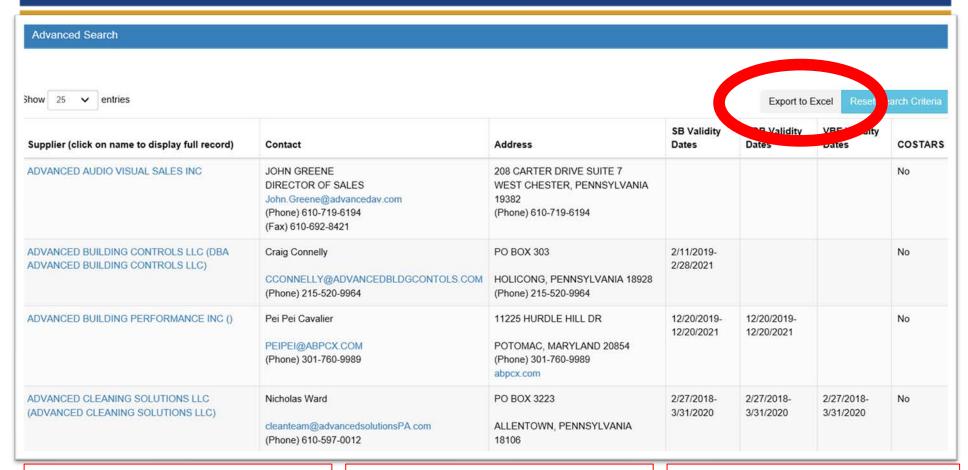
Advanced Cleaning Solutions LLC

Supplier Profile





Search Results



Certified Small Businesses

- Advanced Building Controls LLC
- Advanced Building Performance Inc
- Advanced Cleaning Solutions LLC

Small Diverse Businesses

- Advanced Building Performance Inc
- Advanced Cleaning Solutions LLC

Veteran Business Enterprise

Advanced Cleaning Solutions LLC



Excel Export Results – Supplier Contacts

Excel Export Results includes Vendor ID, Supplier Name, Contact Name, Email, Phone, Fax

A	В	С	D	Е	F	0	Н	1	J	K
1 SAP Number	er Supplier Name	Contact Name	Name	Title	Email	PhoneAreaCode	PhoneNumber	PhoneEx	x FaxAreaCo	FaxNumber
2 104279	CA WEISS SALES LLC	CORPORATE			caweiss@comcast.net					
3 104279	CA WEISS SALES LLC	SB MAIN	KRISTY ZARICHNIAK		kristyz@comcast.net	610	4588864			4588875
4 119565	DUFF SUPPLY COMPANY	CORPORATE	ALEX DUFFINE	VP	DFRANK@DUFFCOMPANY.COM	610	2754453	147	610	2796299
5 119565	DUFF SUPPLY COMPANY	REMITTO	BARB COHEN		bcohen@duffco.com	610	2754453	149	610	2756761
6 119565	DUFF SUPPLY COMPANY	SB MAIN	ALEX DUFFINE		aduffine@duffco.com	610	2754453			
7 119565	DUFF SUPPLY COMPANY	SB SECONDARY			info@duffco.com					
8 122594	HOUCK SERVICES INC	CORPORATE			jherrold@houcks.com					
9 122594	HOUCK SERVICES INC	SB MAIN	JARROD HERROLD		jherrold@houcks.com	717	6573302		717	6579805
10 122594	HOUCK SERVICES INC	SB SECONDARY			kgussler@houcks.com					
11 134717	PENN STATE ELECTRIC MECHANICAL	CORPORATE			razmataz33@aol.com					
12 134717	PENN STATE ELECTRIC MECHANICAL	SB MAIN	RAZ SUGARWALA		razmataz33@aol.com	717	2992090		717	2992297
13 134717	PENN STATE ELECTRIC MECHANICAL	SB SECONDARY			ksing6027@yahoo.com					
14 135270	BARBARA J SALES ASSOC INC	CORPORATE			barb@barbarajsles.com					
15 135270	BARBARA J SALES ASSOC INC	SB MAIN	BARBARA SMITH		barb@barbarajsales.com	412	5233398		800	8137122
16 135270	BARBARA J SALES ASSOC INC	SB SECONDARY			willsmith@willjservices.com					
17 137893	IDA YEAGER SALES INC	CORPORATE			idayeagersales@zoominternet.net					
18 137893	IDA YEAGER SALES INC	SB MAIN	IDA LAQUATRAYEAGER		idayeagersales@zoominternet.net	724	4525260		724	4521072
19 144061	CONSTRUCTION TOOL SERVICE INC	CORPORATE			ehuss@constructiontoolservice.com					
20 144061	CONSTRUCTION TOOL SERVICE INC	SB MAIN	BETTY CONNELLY		bconnelly@constructiontoolservice.com	412	6816673		412	6819185
21 144061	CONSTRUCTION TOOL SERVICE INC	SB SECONDARY			bcgoodwork@aol.com					
22 145576	BURKE & MICHAEL INC	CORPORATE			MARYFRANCES@BURKEANDMICHAEL.COM					
23 145576	BURKE & MICHAEL INC	SB MAIN	MARY FRANCES HOGAN		maryfrances@burkeandmichael.com	412	3212301		412	3214582
24 153927	COOPER TRADING INC	CORPORATE			cti@ctipa.com					
25 153927	COOPER TRADING INC	SB MAIN	PETER COOPER		pete@ctipa.com	724	8618830		724	8618832
26 153927	COOPER TRADING INC	SB SECONDARY			debbie@ctipa.com					
27 157009	CONTRACT HARDWARE AND SUPPLY	CORPORATE			cristil@chsupplyinc.com					
28 157009	CONTRACT HARDWARE AND SUPPLY	SB MAIN	BRAD BOTTEICHER		bradb@chsupplyinc.com	814	9412340		814	9412342

| Suppliers | Supplier Addresses | Supplier Contacts | Counties | Supplier Classifications | TQs | TQ Contracts | UNSPSC Codes |



Appendix G – SDB Participation Summary

Small Diverse Business (SDB) Participation Summary Sheet

Solicitation/Project #: OGC-2021-20

Issuing Agency: Department of General Services on behalf of the PA Insurance Department

Name of Procurement/Project: Mcare Section 715 Defense Counsel RFP

SDB Participation Goal (for MBE, WBE, LGBTBE, DOBE, and SDVBE): 13%

Attachments:

SDB-1	Instructions for completing SDB Participation Submittal and SDB Utilization
	Schedule
SDB-2	SDB Participation Submittal
SDB-3	SDB Utilization Schedule
SDB-3.1	SDB Letter of Commitment
SDB-4	Guidance for Documenting Good Faith Efforts to meet the SDB Participation goal
SDB-5	Good Faith Efforts Documentation to Support Waiver Request of SDB
	Participation Goal



Appendix H – VBE Participation Summary

Veteran Business Enterprise (VBE) Participation Summary Sheet

Solicitation/Project #: OGC-2021-20

Issuing Agency: Department of General Services for the PA Insurance Department

Name of Procurement/Project: Mcare Section 715 Defense Counsel RFP

VBE Participation Goal (for VBE and SDVBE):

<u>3</u>%

Attachments:

VBE-1	Instructions for completing VBE Participation Submittal and VBE Utilization
	Schedule
VBE-2	VBE Participation Submittal
VBE-3	VBE Utilization Schedule
VBE-3.1	VBE Letter of Commitment
VBE-4	Guidance for Documenting Good Faith Efforts to meet the VBE participation goal
VBE-5	Good Faith Efforts Documentation to Support Waiver Request of VBE
	Participation Goal



New Forms and Processes

- SDB/VBE Instructions *SDB-1/VBE-1 READ*
- SDB/VBE Participation Submittal *SDB-2/VBE-2*
- SDB/VBE Utilization Schedule *SDB-3/VBE-3*
- Letter of Commitment *SDB 3.1/VBE-3.1*
- Guidance for Good Faith Effort (GFE) Waiver –
 SDB-4/VBE-4 READ
- GFE Waiver *SDB-5/VBE-5*



SDB Submittal Instructions – SDB-1

SDB-1

INSTRUCTIONS FOR COMPLETING THE SMALL DIVERSE BUSINESS (SDB)
PARTICIPATION SUBMITTAL AND SDB UTILIZATION SCHEDULE.

PLEASE READ BEFORE COMPLETING THESE DOCUMENTS
Bidders/Offerors do not need to return SDB-1 with their SDB Participation Submittal

The following instructions include details for completing the SDB Participation Submittal (SDB-2) which Bidders or Offerors must submit in order to be considered responsive.

The following instructions also include details for completing the SDB Utilization Schedule (SDB-3), which Bidders or Offerors must submit for any portion of the SDB participation goal the Bidder or Offeror commits to meeting.

A Bidder/Offeror's failure to meet the SDB participation goal in full or their failure to receive an approved Good Faith Efforts waiver for any unmet portion of the SDB participation goal will result in the rejection of the Bid or Proposal as nonresponsive.

I. <u>SDB Participation Goal</u>: The SDB participation goal is set forth in the eMarketplace advertisement and also in the Notice to Bidders. The Bidder/Offeror is encouraged to use a diverse group of subcontractors and suppliers from the SDB classifications to meet the SDB participation goal.

II. SDB Eligibility:

- Finding SDB firms; Offerors can access the directory of <u>DGS-verified</u> SDB firms from the DGS Supplier Search directory at: http://www.dgs.internet.state.pa.us/suppliersearch.
- Only SDBs verified by DGS and as defined herein may be counted for purposes of achieving the SDB participation goal. In order to be counted for purposes of achieving the SDB participation goal, the SDB firm, including an SDB prime, must be DGS-verified for the services, materials or supplies that it has committed to perform on the SDB Utilization Schedule (SDB-3). A firm whose SDB verification is pending or



SDB Submittal – SDB-2

CRITICAL

Check One, and
Only One, Box

SDB-2 SDB PARTICIPATION SUBMITTAL

CK ONE, AND ONLY ONE, BOX. FAILURE TO COMPLY WILL RESULT IN ALJECTION OF YOUR BID/PROPOSAL.

Click on bold titles to navigate to that specific page.

I agree to meet
the SDR
participation goal
in full.

I have completed and am submitting with my bid or proposal an SDB Utilization Schedule (SDB-3), which is required in order to be considered for award. I am requesting a partial waiver of the SDR participation goal

After making good faith outreach efforts as more fully described in the Guidance for Documenting Good Faith Efforts to Meet the SDB Participation Goal, I am unable to achieve the total SDB participation goal for this solicitation and am requesting a partial waiver of the SDB participation goal.

I have completed and am submitting with my bid or proposal both of the following, which are required in order to be considered for award:

1. an SDB Utilization Schedule

I am requesting a full waiver of the SD participation goal

After making good faith outreach efforts as more fully described in the Guidance for Documenting Good Faith Efforts to Meet the SDB Participation Goal, I am unable to achieve any part of the SDB participation goal for this solicitation and am requesting a full waiver of the SDB participation goal.

I have completed and am submitting with my bid or proposal a Good Faith Efforts Waiver Request for



SDB Utilization Schedule - SDB-3

CRITICAL Verify SDB/VBE Validity

SDB-3 SDB UTILIZATION SCHEDULE

Territorial and SDBs (including where applicable a prime bidder or offeror is self-performing a portion of the work) that will meet the SDB participation goal (add additional pages if necessary). Submit a Letter of Commitment (SDB-3-1) for each subcontractor, supplier, or manufacturer (add additional Letters of Commitment as necessary).

SDB Name SAP Vendor Number (6-digit number provided by SDB) SDB Verification Number (located on DGS SDB verification)	Type of SDB (check all that apply)	Description of Work to be Performed (Statement of Work/Specification reference)	% Commitment (or % of work to be self-performed by SDB bidder/offeror)	Dollar Value of Commitment (after applying any calculation per SDB-1, Section IV, Calculating SDB participation)
Name: <u>ABC IT Solutions</u> SAP Vendor Number: <u>123456</u> SDB Verification Number: <u>123456-2016-09-SB-M</u>	MBE	IT staffing resources	%	2
Name: SAP Vendor Number: SDB Verification Number:	MBE WBE LGBTBE DOBE SDVBE		96	
Name: SAP Vendor Number: SDB Verification Number:	MBE WBE LGBTBE DOBE SDVBE		%	
Name: SAP Vendor Number: SDB Verification Number:	MBE WBE LGBTBE DOBE SDVBE		%	
Name: SAP Vendor Number: SDB Verification Number:	MBE WBE LGBTBE DOBE SDVBE		96	
Attach additional sheets if necessary			Total % SDB commitment: 0	Total S amount: \$0



Letter of Commitment SDB-3.1

CRITICAL Complete all shaded areas. shaded areas.

SDB-3-1 LETTER OF COMMITMENT

as confirmation of the commitment by the prime Bidder or Offeror ss (SDB) on the below-referenced Solicitation/Project.

1			
		Bidder/Offeror Information	SDB Information
4			
	Address		
	Point of Contact		
	Telephone number		
	Email address		

<u>Services/Supplies and Time Frame</u>. If Bidder/Offeror is the successful vendor, the SDB shall perform or provide the following services or supplies during the term of the prime contract, as more specifically set forth below:

Services or supplies the VBE will provide:	
Specific Time Frame the VBE will provide the services or supplies:	

<u>Dollar Value of Commitment</u>. These services or supplies represent \$______ for the term of the contract.

<u>SDB verified</u>. By signing below, the SDB represents that it meets the SDB requirements set forth in the Solicitation and all required documentation has been provided to the Bidder/Offeror for its SDB submission.

Sincerely,	Acknowledged
Printed name	Printed name

SDB to expect a letter and SIGN it!



Guidance to Document GFE SDB-4

READ, READ, READ

- The ability or desire of a prime contractor to perform the work of a contract with its own organization does not relieve the Offeror of the responsibility to make Good Faith Efforts to meet the SDB participation goal.
- Prime must complete all components of the GFE paperwork.
 Details/Evidence are important, proof is required.
- Carefully review SDB and VBE submittal Instructions, specifically
 Section VI of SDB/VBE-1 which lists pertinent items as Fatal errors.



Good Faith Efforts Packet SDB-5

Good Faith Efforts (GFE) Partial or Full Waiver

- Identified Items of Work Applicant Made Available to SDBs (Part 1)
- ☐ Identified SDBs and Record of Solicitations (Part 2)
- SDB Outreach Compliance Statement (Part 3)
- □ Additional Information Regarding Rejected SDB Quotes (Part 4)
- ☐ SDB Subcontractor Unavailability Certificate (Part 5)



SDB GFE Documentation – SDB-5

SDB-5 GOOD FAITH EFFORTS DOCUMENTATION TO SUPPORT WAIVER REQUEST OF SDB PARTICIPATION GOAL

Project Description:		
Commonwealth Agency Name:		
Solicitation #:		
Solicitation Due Date and Time:		
	Complete all five parts	
Bidder/Offeror Company Name:		
Bidder/Offeror Contact Name:		
Bidder/Offeror Contact Email:		
Bidder/Offeror Contact Phone Number:		

Part 1 – Identified Items of Work Offeror Made Available to SDBs

Identify those items of work that the Offeror made available to SDBs. This includes, where appropriate, those items the Offeror identified and subdivided into economically feasible units to facilitate the SDB participation. For each item listed, show the anticipated percentage of the total contract amount. It is the Offeror's responsibility to demonstrate that enough work to meet the SDB participation goal was made available to SDBs, and the total percentage of the items of work identified for SDB participation met or exceeded the SDB participation goal set for the procurement.

Identified Items of Work	Was this work listed in the solicitation?	Does Offeror normally self- perform this work?	Was this work made available to SDB Firms? If not, explain why.
	yes no	yes no	yes no
	7100	7100	Tron



Identic Items of Work Offeror Made Available to SDBs

CRITICAL

List all components

of work offered for that the Offeror made available to SDBs. This includes, where appropriate, those items the Offeror identified sible units to facilitate the SDB participation. For each item listed, show the anticipated percentage of the total e that enough work to meet the SDB participation goal was made available to SDBs, and the total percentage ST SDB participation met or exceeded the SDB participation goal set for the procurement.

subco	Was this work listed in the solicitation?	Does Offeror normally self- perform this work?	Was this work made available to SDB Firms? If not, explain why.
	yes no	yes no	yes no
	yes no	yes no	yes no
	yes no	yes no	yes no
	yes no	yes no	yes no
	yes no	yes no	yes no

Attach additional sheets if necessary.



ntified SDBs and Record of Solicitations

CRITICAL

Specifics and Details ed to provide quotes for the Identified Items of Work made available for SDB participation. Include the name of the SDB are important r which quotes were solicited, date and manner of initial and follow-up solicitations, whether the SDB provided a quote, ing used toward meeting the SDB participation goal. SDBs used to meet the SDB participation goal must be listed on on Schedule (SDB-2).

Copies of all written solicitations and documentation of follow-up calls to SDBs must be attached to this form. For each Identified SDB w, Offeror should submit an SDB Subcontractor Unavailability Certificate signed by the SDB or a statement from the Offeror that the efused to sign the SDB Subcontractor Unavailability Certificate.

Name of Identified SDB and Classification	Describe Item of Work Solicited	Initial Solicitation Date & Method	Follow-up Solicitation Date & Method	Details for Follow-up Calls	Quote Received?	Quote Used?	Reason Quote Rejected
SDB Name:		Date: mail email	Date: mail email	Date and Time of Call: Spoke with:	yes no	yes no	Used other SDB Used non-SDB Self performing
MBE WBE LGBTBE DOBE SDVBE		fax	fax	Left Message:			
SDB Name:		Date:	Date:	Date and Time of Call: Spoke with:	yes no	yes no	Used other SDB Used non-SDB Self performing
MBE WBE LGBTBE DOBE SDVBE		fax	fax	Left Message:			

Attach additional sheets as necessary.



SDB Outreach Compliance Statement

CRITICAL

Documentation for
Part 1

1. List the Identified Items of Work for subcontracting opportunities for the solicitation along with specific work categories:
 Attach to this form copies of written solicitations (with Bid or Proposal instructions) used to solicit Identified SDBs for these subcontract opportunities. Offeror made the following attempts to contact the Identified SDBs:
J. J.
4. Bonding Requirements (Please Check One):
This project does not involve bonding requirements.
Offeror assisted Identified SDBs to fulfill or seek waiver of bonding requirements. (DESCRIBE EFFORTS):
5. Pre-Bid/Proposal Conference or Supplier Forum (Please Check One):



Information Regarding Rejected SDB Quotes

CRITICAL

Ocumentation for rt 2 indicates that an SDB quote was rejected because the Offeror is using a non-SDB or is self-performing the the Identified Items of Work, state whether the work will be self-performed or performed by a non-SDB, and if ame of the non-SDB firm. Also include the names of all SDBs and non-SDB firms that provided a quote and the amount of

Describe Led Items of Work not being performed by SDBs (include specific section from bid or proposal)	Self-performing or using non-SDB (provide name of non- SDB if applicable)	Amount of non-SDB quote \$	Name of other firms that provided quotes and whether they are SDB	Amount quoted S	Reason why SDB quote was rejected along with brief explanation
	self-performing using Non-SDB Name:		SDB Non-SDB Name:		price capabilities other
	self-performing using Non-SDB Name:		SDB Non-SDB Name:		price capabilities other
	self-performing using Non-SDB Name:		SDB Non-SDB Name:		price capabilities other
	self-performing		SDB		price



Subcontractor Unavailability Certificate

CRITICAL

Required for each

vendor listed in Part 1

is hereby certified that		(Name of SDB)		
nted at	Number)	(Street)		
(1	(vuinoer)	(Sileet)		
(City)			(State)	(Zip)
()/			((
offered an opportunity	y to bid on Solicita	ation No.		
**		Fritzen Fritzen (1800-		
	(Name of P	Prime Contractor's Firm	1)	

*******		**************************************		******
	******	*****	******	
	******	*****	******	
	******	*****	******	
	******	*****	******	
	******	*****	******	
	******	*****	******	
	******	*****	******	
	******	*****	******	
	******	*****	******	
	******	*****	******	
	******	*****	******	
	******	*****	******	
	sal for this project	*****	******	work/service or



Best Practices

Do's

- Read the solicitation and all instructions completely.
- Submit SEPRATE SDB and VBE submittal forms.
- Validate subcontractor SDB/VBE status in DGS Supplier Database.
- Ensure that all appropriate forms are completed and signed correctly.
- Submit questions early per the solicitation requirements.

Dont's

- Make any assumptions.
- Copy SDB submittal paperwork.
 Download and complete the VBE submittal separately, titles and accuracy matter.
- Skip any portion of the GFE request documentation.
- Forget to verify subcontractor status as current SDB/VBE in DGS Supplier Database.



Notes

- READ, READ, READ, solicitation instructions completely.
- Subcontractors identified in SDB-3, Utilization Schedule must be validated as of bid due date and time.
- Appendix K "Model Form SDB/VBE Subcontractor Agreement" is provided for informational purposes only.
 To be completed by award winning vendor only.



REMINDER



Questions?





BDISBO Contact Info

Bureau of Diversity, Inclusion and Small Business Opportunities

North Office Building 401 North Street, Room 611 Harrisburg, PA 17120-0500 717.783.3119

GS-BDISBO@pa.gov

