

# PENNSYLVANIA HEALTH INSURANCE EXCHANGE AUTHORITY

Date:	<b>April 30, 2020</b>
Subject:	<b>Pre-Proposal Meeting/Call Information Packet</b>
Solicitation:	<b>RFP# PHIEA 20-01 Exchange Assister Services</b>
Due Date/Time:	<b>May 15, 2020 12:00 PM</b>
Addendum Number:	<b>1</b>

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), including but not limited to questions and answers, which are considered a material part of the solicitation.

**Please see the following update:**

Addendum 4 does the following:

1. **Posts the Pre-Proposal Meeting/Call Information Packet, consisting of the following content:**
  - a. Pre-Proposal Meeting/Call Guide
  - b. Pre-Proposal Meeting/Call Registration Sheet
  - c. Pre-Proposal SDB/VBE Presentation

**NOTE:** There were no questions asked during this session, therefore a Q&A form is not attached. Also, due to technical difficulties we are unable to provide a recording of the Meeting/Call at this time; if the problem gets resolved we will submit it as an Addendum to the procurement.

Except as clarified and amended by this Addendum, the terms, conditions, specifications, and instructions of the solicitation and any previous Addendum(s), remain as originally written.

Regards,



Gwen E. Zeh  
Issuing Officer  
PA Health Insurance Exchange Authority  
312-318 Market Street, Bowman Tower, Floor 3  
Harrisburg, PA 17101  
Email: gzeh@pa.gov

**RFP # PHIEA 20-01, Exchange Assister Services  
Pre-Proposal Meeting/Call Guide**

**PRE-PROPOSAL MEETING/CALL GUIDE**

1. Ladies and Gentlemen, my name is Gwen Zeh and I am the **Issuing Officer of the PA Health Insurance Exchange Authority (or PHIEA) RFP**. We are holding this special Pre-Proposal Skype Meeting/Call in order to provide you with detailed information about the new Small Diverse Business and Veteran Business Enterprise Participation program which is a requirement for this RFP.
2. Some housekeeping details:
  - a. When you joined the call, in order to eliminate back ground noise, your phone was muted. If you are asked to speak or if you have any questions, you can un-mute your phone by dialing \* 6; please remember to put your phone back on mute once you have finished speaking.
  - b. The agenda for this Meeting/Call is as follows:
    - i. Roll Call
    - ii. The Bureau of Diversity, Inclusion and Small Business Opportunities Presentation on the SDB/VBE Program
    - iii. Questions and Answers
    - iv. Open Discussions
3. **Roll Call:** At this time, I will take the Roll Call – Through Addendum 2 and 3 of the Solicitation on eMarketplace, we requested if you had an interest in this procurement, that you provide us with your Name, Company Name, Email Address, Telephone # and interest (Prime or Sub) and, as those of you who did submit their information, if you were a Sub, you identified if you were an SDB and/or a VBE.
  - i. I'll first read off the names of the pre-registrants, when I call out your Name and Company Name, please un-mute your phone, acknowledge that you are on the call and re-mute your phone.
  - ii. I will then ask any others who are on the call to un-mute their phones and provide me with your Name and Company Name and re-mute your phone and then, after the call provide me via email to [gzeh@pa.gov](mailto:gzeh@pa.gov) with the all of the information requested in the Addendum: Name, Company Name, Email Address, Telephone # and interest (Prime or Sub) and if Sub if you are an SDB and/or VBE. I will be sharing the list of attendees within an Addendum for the Pre-Proposal Information Packet after 4:00 PM this afternoon so if you want your information included, please send before 4:00 PM.

**RFP # PHIEA 20-01, Exchange Assister Services**  
**Pre-Proposal Meeting/Call Guide**

4. **BDISBO Presentation** I will now turn the call over to Audrey Smith of the BDISBO organization.
5. **Q&A Session** - – please keep in mind we may not be able to answer your questions here but will get answers to all questions and include them in the Q&A part of the Pre-Proposal Information Packet which will be posted as an Addendum to the Solicitation later today or tomorrow. Also be advised that **no answer is official until it is confirmed in writing**. Please un-mute your phone to ask the question and re-mute when you are finished speaking. **PLEASE NOTE: No Questions were asked during this session.**
6. **Open Discussions** – additional introductions or anything else you want to speak to each other about. Remember this is a conference call and everyone deserves the opportunity to be heard so please don't over-talk others and keep your personal discussions to a minimum. After the meeting we will release the names and contact information of the pre-registrants and those who provide their information after the call, so you can make the one-on-one connections that you need to, once the Addendum for the Pre-Proposal Information Packet is published.
7. **Closing Statements.** We would like to thank you for your time and interest in this RFP for PHIEA's Exchange Assister Services. Please continue to monitor the DGS eMarketplace website for additional information for this procurement.

Thank you and have a nice day.

**PRE-PROPOSAL REGISTRATION SHEET**  
**RFP # PHIEA 20-01, Exchange Assister Services**

**Thursday, April 30, 2020 1:30 PM - 2:30 PM**

Page 1 of 1

<b>NAME</b>	<b>COMPANY NAME</b>	<b>TELEPHONE#</b>	<b>E-MAIL ADDRESS</b>	<b>Interest</b>
<b>Pre-Registrations</b>				
Frederick A. Clark	Clark Resources, Inc / A2Z Diversity Solutions, Inc.	717-608-7897	<a href="mailto:fredclark@fclarkresources.com">fredclark@fclarkresources.com</a>	SDB Sub
Tremayne Terry	A2Z Diversity Solutions	717-379-3802	<a href="mailto:tremayne.terry@a2zdiversity.com">tremayne.terry@a2zdiversity.com</a>	SDB Sub
Karen Gage	Cognosante LLC	717-805-2417	<a href="mailto:Karen.gage@cognosante.com">Karen.gage@cognosante.com</a>	Prime
Randy Browning	Cognosante LLC	208-860-5849	<a href="mailto:Randy.Browning@cognosante.com">Randy.Browning@cognosante.com</a>	Prime
Stephen Smith	Cognosante LLC	407-717-1540	<a href="mailto:Stephen.Smith@cognosante.com">Stephen.Smith@cognosante.com</a>	Prime
Ruth Savino	Abel Personnel	C:717-712-7399 O:717-761-8111	<a href="mailto:rsavino@abelpersonnel.com">rsavino@abelpersonnel.com</a>	SDB Sub
<b>Post-Registrations</b>				
Judy Elly	Computer Consultants International, Inc. (CCI)	800-493-2105 ext. 210	<a href="mailto:hr@cci-worldwide.com">hr@cci-worldwide.com</a>	Prime

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**PHIEA 20-01**  
**Exchange Assister Services**  
**Pre-Proposal Conference**

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**pennsylvania**  
BUREAU OF DIVERSITY, INCLUSION  
AND SMALL BUSINESS OPPORTUNITIES

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**RFP # PHIEA 20-01**

# What's the Point?



# SDB and VBE Classification

## *Small Diverse Businesses:*

- Women-owned
- Minority-owned
- LGBTQ-owned
- Disabled-owned
- Service-Disabled Veteran-owned

## *Veteran Business Enterprises:*

- Veteran-owned
- Service-Disabled Veteran-owned

# Solicitation Specific Goals



## SECTIONS 1.2 AND 1.3

	SDB	VBE
PHIEA 20-01 Exchange Assister Services	18%	3%

**Primes are welcome to exceed the goal!**



# Goal Analysis

- Available subcontracting opportunities across the entire state for the specified services,
- Availability of DGS-verified SDB/VBEs to perform commercially useful functions

# Note to Primes

- Know how to search for SDBs and VBEs
- Compliance will be closely monitored and enforced

**pennsylvania**  
DEPARTMENT OF GENERAL SERVICES

## Supplier Search

Home PA eMarketplace Search Contracts

Note: The below searches (Quick Search and Advanced Search) will search suppliers who are qualified for one or more Invitation to Qualify (ITQ) Contracts AND suppliers registered with the Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO) as a small business or small diverse business. Use the Quick Search to search by Vendor Name or Vendor Number. Use the Advanced Search to search by Small, Small Diverse, ITQ Contracts, COSTARS and UNSPC codes.

**Quick Search**

Supplier Name or SAP Number

**Advanced Search**

Show 10 entries

Supplier (click on name to display full record)	Contact	Address	SB Validity Dates	SDB Validity Dates	VBE Validity Dates	COSTARS
1 FINAL CLEAN LLC ()	Mary Misinay Co-Owner 1FINALCLEAN.LLC@GMAIL.COM (Phone) 724-813-7989	5119 E STATE ST HERMITAGE, PENNSYLVANIA	1/12/2020- 1/12/2022			No

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

# RFP Addendum 1

## RFP # PHIEA 20-01 Exchange Assister Services Addendum 1 - Questions & Answers

1. **Question** – We're an SDB firm interested in partnering and providing call center support on this project. Being that there's no pre-bid meeting, I was wondering if potential primes would share their contact information?

**Answer** – Due to COVID-19 we were unable to hold a Pre-Proposal Conference for this project. What we recommend is that the potential primes search the DGS Supplier Search Database at <http://www.dgs.internet.state.pa.us/suppliersearch> for Small Diverse Businesses (SDB) and Veteran Business Enterprises (VBE) using the following list of United Nations Standard Products and Services Code (UNSPSC) Codes:

41105800 - In vitro transcription and translation products  
43231500 - Business function specific software  
43233500 - Information exchange software  
52161500 - Audio and visual equipment  
52161600 - Audio visual equipment accessories  
55121900 - Signage equipment  
60105400 - Consumer economics and money management and independent living instructional materials  
80111600 - Temporary personnel services  
80111700 - Personnel recruitment  
80141500 - Market research  
80141600 - Sales and business promotion activities  
80141700 - Distribution  
80171500 - Situation and stakeholder analysis and communications planning services  
80171600 - Publicity and marketing support services  
80171800 - Media relations services  
81162000 - Cloud-based software as a service  
82101500 - Print advertising  
82101600 - Broadcast advertising  
82101700 - Aerial advertising  
82101800 - Advertising agency services  
82101900 - Media placement and fulfillment  
82111900 - News and publicity services  
83121700 - Mass communication services  
86101700 - Non scientific vocational training services

# Solicitation-Specific Goals



# 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*

## SECTIONS 1.2 AND 1.3

# 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*

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.

This form also includes instructions 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.

Bidder/Offeror shall agree to achieve the SDB participation goal set forth in the SDB Participation Summary Sheet or request a waiver from meeting the entire or a portion of the goal.

**A Bidder/Offeror's failure to meet the SDB participation goal in full or 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. **SDB Participation Goal:** The SDB participation goal is set forth in the SDB Participation Summary Sheet. The Bidder/Offeror is encouraged to use a diverse group of subcontractors

# SDB Submittal – SDB-2

**CRITICAL**  
✓ Check One, and  
Only One, Box

## SDB-2 SDB PARTICIPATION SUBMITTAL

**CHECK ONE, AND ONLY ONE, BOX** FAILURE TO SUBMIT A COMPLETED SDB PARTICIPATION SUBMITTAL WILL RESULT IN REJECTION OF YOUR BID/PROPOSAL.

<input type="checkbox"/> <b>I agree to meet the SDB participation goal in full.</b>  I have completed and am submitting with my bid or proposal an <b>SDB Utilization Schedule (SDB-3)</b> which is	<input type="checkbox"/> <b>I am requesting a partial waiver of the SDB participation goal.</b>  After making good faith outreach efforts as more fully described in the <b>Guidance for Documenting Good Faith Efforts to Meet the SDB Participation Goal</b> , I am unable to achieve the total SDB participation goal for this solicitation and am requesting a partial waiver of the SDB	<input type="checkbox"/> <b>I am requesting a full waiver of the SDB participation goal</b>  After making good faith outreach efforts as more fully described in the <b>Guidance for Documenting Good Faith Efforts to Meet the SDB Participation Goal</b> , I am unable to achieve any part of the SDB participation goal
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# SDB Utilization Schedule – SDB-3

## SDB-3 SDB UTILIZATION SCHEDULE

List in the chart below SDBs (including where applicable a prime bidder or offeror is self-performing a portion of the work) that will be used to meet the SDB participation goal (add additional pages if necessary). Submit a **Letter of Commitment (SDB-3.1)** for each SDB subcontractor, supplier, or manufacturer.

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)	Associated Dollar Value of Commitment
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	%	\$
Name: SAP Vendor Number: SDB Verification Number:	<input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> LGBTBE <input type="checkbox"/> DOBE <input type="checkbox"/> SDVBE			
Name: SAP Vendor Number: SDB Verification Number:	<input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> LGBTBE <input type="checkbox"/> DOBE <input type="checkbox"/> -----			



# Letter of Commitment – SDB-3.1

## SDB-3.1 LETTER OF COMMITMENT

This Letter of Commitment serves as confirmation of the commitment by the prime as the Bidder/Offeror to utilize the Small Diverse Business (SDB) on the below-referenced Solicitation/Project.

Solicitation Number: \_\_\_\_\_

Solicitation Name: \_\_\_\_\_

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

**SDB to  
expect a  
letter and  
SIGN it!**

Services/Supplies and Time Frame. If Bidder/Offeror is the successful vendor, the SDB shall perform or provide the following services or supplies during the initial term of the prime contract and during any extensions, options or renewal periods of the prime contract exercised by the Commonwealth, as more specifically set forth below:

Services or supplies the SDB will provide: \_\_\_\_\_

# Guidance to Document GFE – SDB-4

## READ, READ, READ

### SDB-4

#### GUIDANCE FOR DOCUMENTING GOOD FAITH EFFORTS TO MEET THE SMALL DIVERSE BUSINESS (SDB) PARTICIPATION GOAL

In order to show that the Bidder/Offeror has made Good Faith Efforts to meet the SDB participation goal on a solicitation, the Offeror must either (1) meet the SDB participation goal and document its commitments for participation of SDB firms, or (2) when it does not meet the SDB participation goal, submit a Good Faith Efforts waiver request as set forth in Section IV below and the Good Faith Efforts Documentation to Support Waiver Request (SDB-5) of the SDB Participation Goal.

#### I. Definitions

**SDB participation goal** – “SDB participation goal” refers to the SDB participation goal set for a procurement for MBE, WBE, LGBTBE, DOBE, and SDVBE utilization.

**Good Faith Efforts** - The “Good Faith Efforts” requirement means that when requesting a waiver, the Offeror must demonstrate that it took all necessary and reasonable steps to achieve the SDB participation goal. Those steps are considered necessary and reasonable when their scope, intensity, and relevance could reasonably be expected to obtain sufficient SDB participation, even if those steps were not fully successful. The Issuing Agency and Department of General Services’ Bureau of Diversity, Inclusion and

# 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

<b>Project Description:</b>	
<b>Commonwealth Agency Name:</b>	
<b>Solicitation #:</b>	
<b>Solicitation Due Date and Time:</b>	
<b>Bidder/Offeror Company Name:</b>	
<b>Bidder/Offeror Contact Name:</b>	
<b>Bidder/Offeror Contact Email:</b>	
<b>Bidder/Offeror Contact Phone Number:</b>	

Complete all five parts

#### 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.
	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no
	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no

# REMINDER



**SDB and VBE  
SUBMITTALS**

# Questions?

Submit written  
questions by  
May 5<sup>th</sup>, 2020  
12:00 PM

Proposals Due  
May 15<sup>th</sup>, 2020  
12:00 PM





An abstract background consisting of three distinct horizontal bands of color. The top band is a textured teal or turquoise. The middle band is a horizontal strip of warm, textured orange and yellow. The bottom band is a textured dark blue. The word "INTRODUCTIONS" is centered in white, sans-serif capital letters across the teal band.

# INTRODUCTIONS

# 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](mailto:GS-BDISBO@pa.gov)