Medical Assistance Transportation Program Full Risk Broker Services in Pennsylvania (RFA 28-18)

Pre-Application Conference



Introductions

- Michelle Herring Issuing Officer, Bureau of Procurement & Contract Management
- Laurie Rock-Bureau of Managed Care Operations
- Mara Perez-Bureau of Financial Management
- Audrey Smith Department of General Services
- Other Commonwealth Staff
- Attendees



Agenda

- Ground Rules
- Background
- Critical Points
- Project Overview
- Cost Proposal Submittal
- Timeline
- Break/Question Submittal
- Preliminary, non-official answers



Ground Rules

- Sign in sheets
- Questions may be submitted in writing on the forms provided by the end of this conference
- The Commonwealth team will determine which questions may be preliminarily answered
- Any answers provided are not final until formally issued in writing
- Any changes to the Request For Applications (RFA) will be issued as a formal written addendum
- Any communication shall be made through the RFA Issuing Officer (Michelle Herring)



Project Overview - Background

- RFA #28-18 was issued on December 21, 2018
- The RFA provides sufficient information to enable Applicants to prepare and submit applications
- RFA #28-18 was issued to comply with legislation (Act 40 of 2018) requiring a Full Risk Broker Model for the Medical Assistance Transportation Program for the benefit of eligible Medical Assistance consumers



Critical Points

- To minimize delays in application evaluation and to avoid rejection of your application, read the RFA carefully and submit a complete application, including signature.
- Follow the application format as detailed in Part II of the RFA.

Include the appropriate heading descriptions, respond to all requirements and provide any other relevant information as an appendix.

 Each application must have three separately sealed submittals; Technical, Cost, and Small Diverse Business. (Please pay close attention to the number of hardcopy and electronic submittals required)



Critical Points

- Do not include any cost data in the technical portion of your application.
- Applicants must submit a complete response for each region for which the Applicant is submitting an Application.
- Applications must be received by 12:00 PM on March 5, 2019.
- The RFA will result in grant agreements being awarded for each region; which will commence on the Effective Date and will end three (3) years after the Effective Date. The Department shall have the option to extend the agreements for one (1) additional two (2) year period.
- If an Applicant is submitting applications for all three regions, the Applicant must indicate its first, second and third preference for an award. This information must be included on the Application Cover Sheet (Appendix A) of each application.



Critical Points

- The RFA will be evaluated based on the following criteria:
 - Technical 50%
 - Cost 30%
 - Small Diverse Business/Small Business Participation 20%
- The technical evaluation will be based upon the following criteria, but not in any specific order:
 - Soundness of Approach
 - Applicant Qualifications
 - Personnel Qualifications
 - Understanding the Problem.



The Department is seeking Applicants to provide administrative and operational efficiencies, in each of the three regions; while providing appropriate and cost-effective transportation services to MA consumers enabling them to access necessary medical services and community activities.

The selected Applicant(s) will schedule, manage and make payment for all MATP non-emergency medical transportation (NEMT) services and non-medical transportation for certain nursing facility clinically eligible (NFCE) consumers.



The broad services to be provided include:

- Arranging cost effective transportation services for consumers that reduce the number of no-shows for medical services and medical appointments due to a lack of transportation and coordinating non-medical transportation for eligible NFCE consumers.
- Establishing an adequately staffed Customer Service Center located within the service region, with a sufficient number of trained customer service specialists and operations staff, to interact and assist MA consumers requesting NEMT and non-medical transportation.
- Performing gatekeeping and scheduling functions to provide for the appropriate use of the MATP.



Project Overview

- Establishing a sufficient network of transportation providers that meets the service delivery needs of MA consumers.
- Establishing and maintaining the technological capacity needed to satisfy the requirements for all program services within the scope of the RFA in an efficient and effective manner.
- Developing and maintaining a complaint process that provides for the effective response to consumer issues regarding the delivery of transportation services.
- Developing policies and procedures to eliminate fraud and abuse.
- I am providing only a broad description of the required services. You
 will need to pay close attention to the details describing each of
 these services as explained in Part III of the RFA.



SOST PROPOSAL SUBMITTAL

Appendix F, **Cost Submittal Form**, contains spreadsheets that require the Applicant to provide multiple price points for units of service, including the Applicant's price per trip by various trip modes.

There are two versions of the Cost Submittal Form:

- Non-Emergent Medical Transportation; and
- Non-Medical Transportation.

Applicants must complete the Contractor Information section of the "Contractor Info & Instructions" worksheet.

The remaining input worksheets are organized into the various service regions (East, Central, and West) and Applicants must fill out the appropriate regional sheets for which they intend to apply.



SOST PROPOSAL SUBMITTAL

Within the "I-Mirror" worksheet(s), Applicants input the following for each year of the grant agreement:

- Proposed price per trip by trip mode;
- MATP users by month (if they are not inputting this (and I don't think they are, it should be deleted or changed if they are describing a different light blue box); and
- Number of trips by trip mode by month

These inputs will constitute the service-based costs. The input cells in the "I-Mirror" worksheet are light blue in color.

Appendix Q is the MATP Statewide Databook. It has been provided to aid the Applicant in developing the MATP user and MATP trip projections. In addition, databook worksheets are contained directly within the Cost Submittal Forms.

DHS plans to issue a non-medical version of this Databook as an addendum to the RFA by the end of January.



The service-based costs inputted in the "I-Mirror" worksheet will be captured in the "J-Cost" worksheet as part of operational costs. The "J-Cost" worksheet is the main cost proposal worksheet where the Applicant will input the other operational costs apart from the service costs, as well as the administrative costs. The inputs in the "J-Cost" worksheet are also light blue.

Once the "I-Mirror" and "J-Cost" sheets are finalized for each service region for which the Applicant intends to apply, the Applicant's proposed all-inclusive PMPM rate will be summarized by region and year in the "Cost Summary" worksheet.

Both the MATP and Non-Medical spreadsheets are required as part of the Application submission. Failure to submit both may result in your application being rejected.



Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)

Audrey Smith Procurement Liaison



What do I need to do ?

- Consider subcontracting opportunities available for small diverse and small businesses
- Search the DGS database of SDBs and SBs and identify SDB/SB business partners for opportunities and inclusion
- Complete and submit with your proposal via JAGGAER:
 - SDB/SB Participation Submittal Form
 - Small Diverse Business Letter of Intent



Bureau of Diversity, Inclusion and Small Business

Small Business

*For-Profit US based business
*Independently Owned
*Not dominant in its field
*No more than 100 full-time equivalent

employees

*the business may not exceed three-year average gross revenues of \$38.5 Million, regardless of business type

Small Diverse Business

*Minority-Owned
*Woman-Owned
*Veteran-Owned
*Service Disabled Veteran- Owned
*Disability-Owned
*Lesbian, Gay, Bi-Sexual, Transgender-Owned



Request for Proposal (RFP) : Format and Template

RFP Small Diverse (SDB) and Small Business (SB) Components:

Part I: General Information

- SDB/SB Eligibility and Program Information
- Part II: Criteria For Selection
 - SDB/SB Evaluation Criteria
- Part V: Small Diverse and Small Business Participation Submittal
 - Contractual obligations resulting from SDB/SB Submittal

Jaggaer RFP Format

- Supplier Attachments
- Questions
- 1.2 SDB/SB Participation



How do I find SDBs and SBs?

To search all DGS-verified SDBs and DGS-certified SBs, visit the DGS website at:

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



he	Forms

SMALL DIVERSE BUSINESS (SDB) AND SMALL BUSINESS (SB) PARTICIPATION SUBMITTAL		SMA		NESS (SDB) AND SMALL BUSI ICIPATION SUBMITTAL	INESS (SB)						
	Listing SDB and SB Subco The Offeror must list in the cl	hart below th	e SDBs and SBs that	will be used to meet the percentage	commitments	provided above, al	long with the	MM/DD/YYYY			
Project Description:				clude as many pages as necessary.				[SDB/SB Contact Name]	Offeror:		
RFP #:	(LOI) for each SDB/SB listed.	To receive	oints for SDB or S	B participation commitments, th	e SDB or SB	must be listed in	the	[Title]	RFP:		
(LT #:	Department's directory of s	elf-certified	SBs and DGS/BDIS	SBO-verified SDBs as of the pro	posal due date	e. The directory of	self-certified	[SDB/SB Company Name]			
Proposal Due Date:	SBs and DGS/BDISBO-verified SDBs can be accessed at the following link:						[Address]				
	http://www.dgs.pa.gov/Bus	sinesses/Sr	nall Diverse Busine	ess Program/Small-Diverse-Busi	iness-Verific	ation/Pages/Find	ding-Small-	[City, State, Zip] [Email]			
Commonwealth Agency Nam	Diverse-Businesses.aspx#	.WVPvzp3D-						[Phone #]			
OFFEROR (Prime Contractor) INFORMATION	SDB/SB name, percent commi	itment to SD	B/SB, and estimated \$	s value of commitment will automat	ically populate	e in the LOI tabs.		Dear: [SDB/SB Contact Name]			
Offeror Company's Name:	Offeror Company's Name:	0						This letter serves as confirmation of the in	itent of this offeror to u		
					% of Total	Estimated S	Will SDB/SB	on the above-referenced RFP issued by			
Offeror Contact Name: Email					Contract	Value of	be used for				
Fitle: Phone	000000				Cost	Commitment	Options/		Ferenced SDB/SB shall perform the following work, goods or e contract and during any extensions, options or renewal		
rnone	SDB/SB Subcontractor		Primary Contact	Description of Services or	Committe		Renewals?		the Commonwealth, as more specifically set forth below:		
s your firm a DGS-Verified Small Diverse Business? NO 👻 Verif Exp:	Name	SDB or SB	Name	Supplies to be Provided	d	Contract Term	(YES/NO)		the initial contract term and any extensions, options and		
								renewals when the work, goods or service			
s your firm a DGS-Self-Certified Small Business? NO 🗸 Cert Exp:		•					•	Identify the specific work, goods or servic			
Fo confirm your company's \$DB/\$B status and expiration, please click or use the following link:								[Identify the specific work, goods or servi			
http://www.dgs.pa.gov/Businesses/Small Diverse Business Program/Small-Diverse-Business-		•									
/erification/Pages/Finding-Small-Diverse-Businesses.aspx#.WVPvzp3D-											
SUBCONTRACTING INFORMATION								hese services represer of the tot	tal cost in the Offeror's cost submittal for the initial term of the		
		•			_		•		ontract pricing and actual contract usage or volume, it is e:		
Percentage Commitment for SDB and SB Subcontracting Participation								at above-referenced SDB/SB will receive a	an estimate during the initial contract term.		
Commitment percentages will automatically calculate in the SDB/SB fields below after you have		•					•	The shows informed SDR (SD investigated	that it meets the small or small diverse business requirements		
completed the SDB and SB Subcontractor Listing on the "Listing" tab.									tation has been provided to the Offeror for its SDB/SB submis		
After examination of the contract documents, which are made a part hereof as if fully set forth herein, the							_	forth in the ferr and an required document	auton has been provided to the Orieror for its 3DB/3B subilits		
Offeror commits to the following percentages of the total contract cost for Small Diverse Business and Small							•	We look forward to the opportunity to			
Business subcontracting participation.								on this project. If you have any questions concerning our small business or small diverse busine			
Small Diverse Business Subcontracting percentage commitment:		•			_		•	commitment, please feel free to contact me	at the number below.		
0.000%		•						Sincerely,	Acknowledged,		
Small Business Subcontracting percentage commitment:								X	X		
Sman Dusiness Subcontracting percentage communent.		•					•	Offeror Contact Name:	[SDB/SB Contact Name]		
0.000%	Total SDB % Commitment	0.000%						Title:	[Title]		
0.00070 Bavired 01-16-2018	Total SB % Commitment:	0.000%	1				Ravizad01-16-2018	Offeror Company's Name:	[SDB/SB Company Name] Beviced 01.16.20		



BSB Language

This section provides an overview of The Department of General Services' Small Diverse and Small Business Program.

It includes general information, a review of the eligibility requirements, the RFP SDB/SB evaluation and scoring process, submittal requirements and contract requirements.

All reference internet links and explanations of terms can be found here.

SMALL DIVERSE BUSINESS AND SMALL BUSINESS PARTICIPATIC SUBMITTAL

A. General Information. The Issuing Office encourages participation by Small Divers Businesses (SDB) and Small Businesses (SB) as prime contractors and encourages all pri contractors to make significant commitments to use SDBs and SBs as subcontractors and suppliers.

A SB must meet each of the following requirements:

- Δ The business must be 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 or full-time equivalent employe
- The business, by type, may not exceed the following three-year average gross sales:
 - o Procurement Goods and Services: \$20 million
 - o Construction: \$20 million

I۸

- Building Design Services: \$7 million
- o Information Technology Goods and Services: \$25 million

For credit in the RFP scoring process, a SB must complete the Department of General Services (DGS)/Bureau of Diversity, Inclusion and Small Business Opportunities (BDISB self-certification process. Additional information on this process can be found here: <u>Small Business Self-Certification</u>.

A SDB is a DGS-verified minority-owned small business, woman-owned small business, veteran-owned small business, service-disabled veteran-owned small business, LGBT-ow small business, Disability-owned small business, or other small businesses as approved by DGS, that are owned and controlled by a majority of persons, not limited to members of minority groups, who have been deprived of the opportunity to develop and maintain a competitive position in the economy because of social disadvantages.

For credit in the RFP scoring process, a SDB must complete the DGS verification proces Additional information on this process can be found here: Small Diverse Business Verification.

An Offeror that qualifies as a SDB or SB and submits a proposal as a prime contractor is prohibited from being included as a subcontractor in separate proposals submitted by othe Offerors. A SDB or SB may be included as a subcontractor with as many prime contract as it chooses in separate proposals.



articipation Submittal Form

ction 1 Conoral Information

- Project Description This can be found in the title of the solicitation
- RFP # Found on the solicitation cover page
- Proposal Due Date Found on the information page of the solicitation
- Commonwealth Agency Name – Found on the cover and information page of the solicitation be found in the title of the solicitation

SMALL DIVERSE BUSINESS (SDB) AND SMALL BUSINESS (SB)
PARTICIPATION SUBMITTAL

Project Description:

RFP #:

Proposal Due Date:

Commonwealth Agency Name:



Т

- Offeror Company's Name This should be the name of the Prime respondent to the solicitation.
- Offeror Contact Name The name of the authorized representative who can, if and when necessary, provide clarification on the submitted forms. Their official job title and email and phone #.
- Is the Prime Offeror a DGS- verified SDB or DGS-self-certified SDB? If "Yes" provide expiration date of Verification/Cert.
- A link to the DGS SDB/SB database is provided for reference purposes

OFFEROR (Prime Contractor)	INFORMATION
Offeror Company's Name:	
Offeror Contact Name:	Email:
Title:	Phone:
Is your firm a DGS-Verified Small Diverse Business?	YES 👻 Verif Exp:
Is your firm a DGS-Self-Certified Small Business?	NO Cert Exp:
To confirm your company's SDB/SB status and expiration, please click on http://www.dgs.pa.gov/Businesses/Small Diverse Business Program/second Small-Diverse-Businesses.aspx#.WVPvzp3D-	<u> </u>

STIDGONTD & OTDIG DIEGDNA TION



Т

ection 3 – Subcontracting Information

- Total percent prime contractor commitments made to SDB and/or SB on the Sub Listing form. **When completed electronically, these fields are automatically calculated from the Listing form (next tab).
- The SDB and SB point allocation is based entirely on the percentage of the contract cost committed to SDB or SB businesses.
- The Department's directory of selfcertified SBs and DGS/BDISBOverified SDBs can be accessed here:

Find Small and Small Diverse Businesses.

SUBCONTRACTING INFORMATION

Percentage Commitment for SDB and SB Subcontracting Participation

Commitment percentages will automatically calculate in the SDB/SB fields below after you have completed the SDB and SB Subcontractor Listing on the "Listing" tab.

After examination of the contract documents, which are made a part hereof as if fully set forth herein, the Offeror commits to the following percentages of the total contract cost for Small Diverse Business and Small Business subcontracting participation.

Small Diverse Business Subcontracting percentage commitment:

0.000%

Small Business Subcontracting percentage commitment:

0.000%

Revised 01-16-2018



- You may add up to 8 SDB/SB subcontractor. You may not yourself if you are the prime contractor submitting the RFP/Q.
- For each Sub: provide company name; select from drop-down "SDB" or "SB"; contact name; short description; % of commitment based on total contract cost; estimated dollar of the % committed; select "Yes" or "No" if sub will be used for options/renewals/extensions.
- Total SDB and/or SB % commitment is tallied at bottom of form and carried over to Submittal form.

SMALL DIVERSE BUSINESS (SDB) AND SMALL BUSINESS (SB) PARTICIPATION SUBMITTAL

Listing SDB and SB Subcontractors

17

The Offseor must like in the chart below the SDBs and SBs that will be used to meet the percentage commitments provided above, along with the requested information about each SDB and SB Subcontractor. Include as many pages as necessary. Offerors must also include a Letter of Intent (20) for each SDBSB listed. To receive points for SDB or SB participation commitments, the SDB or SB must be listed in the Department's directory of self-certified SBs and DGS/BDISBO-verified SDBs as of the proposal due date. The directory of selfcertified SBs and DGSBDISBO-verified SDBs ne be accessed at the following link:

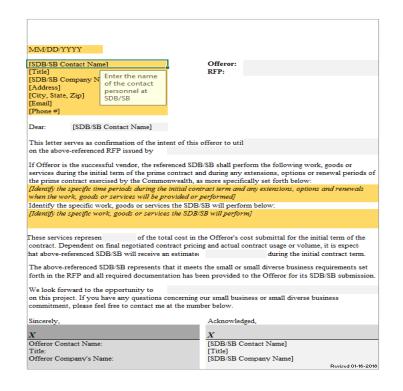
http://www.dgs.pa.gov/Businesses/Small Diverse Business Program/Small-Diverse-Business-Verification/Pages/Finding-Small-Diverse-Businesses.aspx#.WVPvzp3D-

DB/SB name, percent commitment to SDB/SB, and estimated \$ value of commitment will automatically populate in the LOI ta

Offeror Company's Name:				% of Total	Estimated \$ Value of	Will SDB/S be used fo
SDB/SB Subcontractor Name	SDB or SB	Primary Contact Name	Description of Services or Supplies to be Provided	Contract Cost Committe	Commitment for Initial Contract	Options/ Renevals (YES/NO)
	-					
	+					
	+					
	+					
	•					
	+					
	+					
	•					
otal SDB % Commitment otal SB % Commitment:	0.000%					Revired 0



- Note that there are 8 LOIs, each corresponding to sub contractors in the Listing form.
- Only complete areas highlighted in Yellow. Other pertinent information is pulled from the Submittal and Listing forms.
- Unless electronically signed, upon completion, please print, sign, and send to corresponding sub for their signature as well.





What do I need to know?

- Raw score will be calculated by crediting commitments to SDBs and SBs in accordance with percentages proposed.
- To receive points for SDB or SB participation commitments, the SDB or SB must be listed in the Department's directory of self-certified SBs and DGS/BDISBO-verified SDBs as of the proposal due date and time. BDISBO reserves the right to adjust overall SDB or SB commitments to correctly align with the SDB or SB status of a prime contractor or subcontractor as of the solicitation due date and time, and also to reflect the correct sum of individual subcontracting commitments listed within the Letters of Intent.

SDB/SB Raw Score = 200 (SDB% + (SB% x 1/3))

• Proposer submitting the highest scoring SDB/SB Participation Submittal will receive all available points, with other Proposers' raw scores adjusted pro rata



What do I need to know?

- Contract commitments made to SDBs/SBs become contractual obligations upon contract execution.
- Selected Proposer must submit a final, executed subcontract for each SDB/SB named within 30 days of contract execution
 - SDB/SB subcontractors must perform 50% of the work subcontracted to them
 - o If subcontract cannot be achieved, Selected Proposer must notify BDISBO
- Individual percent commitments cannot be altered without written approval from BDISBO
- All SDB/SB commitments must be maintained if the contract is assigned to another prime contractor.
- Selected Proposer must complete quarterly utilization reporting, tracking progress in meeting commitments.
- Selected Proposer must contact BDISBO if circumstances arise that may affect the ability to comply with contract commitments.



What's New?

- Consideration for and inclusion of Small Businesses as prime contractors and subcontractors in addition to Small Diverse Businesses in scoring.
- Simple, consistent template form for SDB/SB submittal supported by executed Letters of Intent.
- DGS issued SDB/SB certificate not required with submittal.
- To receive points for SDB or SB participation commitments, the SDB or SB must be listed in the Department's directory of self-certified SBs and DGS/BDISBO-verified SDBs as of the proposal due date and time. BDISBO reserves the right to adjust overall SDB or SB commitments to correctly align with the SDB or SB status of a prime contractor or subcontractor as of the solicitation due date and time, and also to reflect the correct sum of individual subcontracting commitments listed within the Letters of Intent.



Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)

Telephone: (717) 783-3119

Audrey Smith, Procurement Liaison E-Mail: <u>audresmith@pa.gov</u> 717-346-8105

Curtis Burwell, Procurement Compliance E-Mail: <u>cburwell@pa.gov</u> 717-787-4834



Timeline

- The Project Timeline includes:
 - December 21, 2018 RFA 28-18 is issued
 - January 11, 2019 Pre-application Conference
 - March 5, 2019 Due date for applications



Break & Question Submittal

Questions may be submitted in writing on the forms provided during this break or at the end of the conference.



Questions

- To date, 12 written questions have been submitted.
- You may submit additional questions today on the forms provided.
- Questions submitted today will be read and a preliminary response will be provided.
- We will not answer any question not provided in writing.
- No answer is official until it is answered in writing.
- Answers will be posted to the DGS website as an addendum to the RFA.



RFA #28-18

- This concludes the pre-application conference.
- Answers to all questions posed will be posted to the DGS website at: <u>http://www.emarketplace.state.pa.us/Search.aspx</u>
 by close of business January 25, 2019.
- No further questions will be entertained or answered.



Michelle Herring Department of Human Services Bureau of Procurement & Contract Management Health & Welfare Bldg., Rm 402 Harrisburg, PA 17120 Telephone No: (717)787-9200 mailto:ra-pwRFAquestions@pa.gov

Any contact with the Department concerning this RFA must be through the RFA Issuing Officer.

