

Pre-Proposal Conference
Developmental Disabilities Administration Solicits
Level of Need Assessments (LON) Proposal
DHMH-OPASS 17-15929
eMM#MDM0031027210
June 13, 2016

Conference began at 10:00 a.m.

Opening Remarks and Introductions were facilitated by Queen Davis, Contract Officer for the Office of Procurement and Support Services (OPASS). Sign-in sheet was provided.

Attendance:

Queen Davis, Contract Officer, OPASS; Littia Silver, Procurement Coordinator, DDA; Terah Tessier, Director of Coordination of Community Services, DDA; Victoria Dunn, Chief of Procurement, DDA; Patricia Sastoque, Deputy Director of Programs, DDA; Janelle Robinson, DHMH/MBE Director, DHMH; Dorian Edwards, Director of Operations & IT, Support Network, Inc.; Terilynn R. Murray, President, Support Network, Inc.; Jerry Jennings, Vice President, Clinical Services, Liberty Healthcare Corporation; Katharina Lester, Tellijen;

Minutes transcribed by Nicole C. Smith, Administrative Aide, DDA

Agenda:

A. Overview of Procurement Process-Queen Davis

Section 1-General Information

The Department of Health and Mental Hygiene (DHMH), Developmental Disabilities Administration (DDA) is issuing this Request for Proposals (RFP) to conduct level-of-need assessments which will be used to determine an appropriate level of individual reimbursement to people who utilize services funded by the DDA on a statewide basis. The Department intends to make a single award as a result of this RFP. See RFP Section 1.15 for more information. It is the State's intention to obtain services, as specified in this RFP, from a Contract between the selected Offeror and the State. The anticipated duration of services to be provided under this Contract is two years, with three year options. See Section 1.4 for more information.

As noted, DHMH has issued this RFP to obtain bidders who will provide the Level of Need Assessments. Subsequent to documentation regarding this solicitation will be posted on eMarylandMarketplace website. The web address is <https://emaryland.buyspeed.com/bs>. The information is listed in the RFP in Section 1, subsection 1.8-eMarylandMarketplace. Section 1 starting on page 7 should be carefully reviewed.

Section 1.9-Questions

Potential Offerors/Bidders were informed that their questions asked at the Pre-Proposal Conference also must be submitted to the Department in writing for clarity purposes. The question and answers along with the conference minutes and conference documents will be posted on eMarylandMarketplace and the DHMH website. Section 1.9-Questions must be reviewed thoroughly to gain a full understanding on how

and to whom questions are to be submitted. Section 1.9 can be found on page 11 of the RFP. Questions to Queen Davis, Contract Officer for OPASS with a copy to the Procurement Coordinator shall be submitted via <http://dhmh.solicitationquestions@maryland.gov>. Questions are to be submitted at least five days prior to the proposal due date. Based on availability of time to research, communicate and answer, the Contract Officer will decide whether to respond before the proposal due date.

The contract resulting from this solicitation will be in effect for two years beginning on January 1, 2017, ending December 31, 2018.

Section 1.30-Payments by Electronic Funds Transfer (EFT)

By submitting a response to this solicitation, the Bidder/Offeror agrees to accept payments by electronic funds transfer (EFT) unless the State Comptroller's Office grants an exemption. Payment by EFT is mandatory for contracts exceeding \$200,000. This section also speaks to how to register or request an exemption. Please review Sections 1.30 and 1.31 carefully.

Key Points to Review:

- 1) First the Procurement method issued for this solicitation is competitive and sealed. There are several steps used in this method. Attention to the solicitation steps is crucial to the success of your submission of your proposal.
- 2) Section 2.1-Minimum Qualifications
The Offeror/Bidder must submit proof that the minimum qualifications have been met.

Section 3-Scope of Work

The purpose of this contract is to ensure that people who are entering and receiving DDA services have objective and un-biased assessments for their levels of need so that the DDA can determine the proper services and/or rates of payments to the service providers.

Subsection 3.1.8

Please review this section as it speaks to the Contractor's responsibility for completing the level of need assessments for individuals who have been deemed eligible for services.

Section 3.2-Scope of Work: Requirements

Please review this section as it speaks to the Department's expectations to the prospective Offeror/Bidder and the provisions of the services.

Section 4-Proposal Format

Offerors/Bidders must submit their responses to this proposal in two parts: Technical and Financial.

The proposals are to be in two separate volumes. The first volume is the Technical Proposal and the second volume is the Financial Proposal. Both proposals must be in separate, sealed envelopes.

Offerors/Bidders are required to submit the Minority Business Enterprise-Attachment D-1 which must be in a separately, sealed envelope. The MBE Attachment D-1 must be submitted with the Technical Proposal.

Subsection 4.2-Proposals

This section explains how to package both proposals and how to submit them. There is a 5% MBE goal that has been established for this contract. Attachment D-1 which is the MDOT Certified MBE Utilization and Fair Solicitation Affidavit must be submitted in a separately, sealed envelope.

B. MBE Participation Overview-Janelle Robinson

The MDOT Certified MBE Utilization and Fair Solicitation Affidavit must be fully and accurately completed and submitted with your bids/proposals. Failure to submit this affidavit with your proposal will cause your proposal submission to be deemed non-responsive. On the attachment-D1 form you must first acknowledge and express your intentions to meet the overall MBE goal percentages established for this solicitation. You must also indicate any sub-goals for this solicitation. If there are no sub-goals for this solicitation, do not enter any information regarding the percentages for the following: African-American, Hispanic American and Asian American and Women Owned Businesses in Section 1. The MBE Participation Schedule should contain the names of Minority Business Enterprises that you intend to use to meet the required MBE goals along with their Federal Employment Identification Number, the MDOT Certification Number as well as their Certification Category. Only MDOT MBE Certification Number is acceptable. MDOT Certification from another entity or jurisdiction will not be accepted. Additionally, the percentages of the total contract value to be provided by the particular MBE should be entered as well as the specific description of the work to be performed by the particular MBE. In the summary you will breakdown the MBE status of the particular MBE sub-contractors and this should be equal to or exceed MBE goal established for this solicitation.

Within ten working days of receiving notice that your firm is the apparent awardee you must submit your Outreach Efforts Compliance Statement-Attachment D-2 and the Sub-Contractor Project Participation Certification which is Attachment D-3. You may request a waiver for the MBE goal. Within ten working days of receiving notice that your firm is the awardee you must submit all required waiver documents for this solicitation in accordance with COMAR 21.11.03.10. Please carefully review the Liquidated Damages Provision in the solicitation regarding compliance with the MBE rules and regulations. Per the regulations, MBE Prime Contractors may count 50% towards the established sub-contracting goal and 100% towards one of the categories of the sub-contracting goals.

Reminder: The MBE-Attachment D-1 Affidavit is required at the time of submission with your Technical Proposal. Failure to submit the Affidavit with the proposal will deem your submission non-responsive and will not be considered further.

A-1. Technical Proposal Requirements-Queen Davis

Offeror/Bidder will submit the proposal in the following sequence.

- 1) 1 Unbound Original
- 2) 7 Unbound Copies
- 3) 1 electronic version on CD/DVD Microsoft Word Format
- 4) 1 electronic version in searchable PDF Format for the Public Information Act. This copy shall be redacted so that confidential and/or proprietary information has been removed.

The Bidder/Offeror must submit a Contract Affidavit-Attachment C to the Procurement Officer within five business days of receiving notification of recommendation of award.

If you have questions as to who your resident agency representative, please call your State Corporate Charter office 410-767-1330. State Corporate Charter Office is located at 301 W. Preston Street, Baltimore, MD 21201. Please note that the contract award would not go into effect until the contract affidavit is signed and submitted after notification of intent of award.

Section 4.4-Technical Proposal

Please carefully review this section as it speaks to the contents included in the Technical Proposal.

Section 4.5-Financial Proposal

Under separate sealed cover from the Technical Proposal and clearly identified in the format identified in Section 4.2-Proposals, the Offeror shall submit the proposal in the following sequence.

- 1) 1 Unbound Original
- 2) 7 Unbound Copies
- 3) 1 electronic version in CD/DVD Microsoft Word or Excel

The Financial Proposal shall contain all price information in the format specified in Attachment F-Financial Proposal Form. Please carefully review pages 103-105 of the RFP for more information.

Comments and notes about the Financial Proposal are located on page 104 of the RFP. Questions about the Financial Proposal Form must be directed to the Contract Officer and the Procurement Coordinator and/or submit via <http://dhmh.solicitationquestions@maryland.gov>.

Section 5-Evaluation Committee, Evaluation Criteria, Selection Procedure

Your proposals will be reviewed by an Evaluation Committee who will utilize the evaluation criteria set forth in COMAR 21.05.03.

Section 5.2.-Technical Proposal Evaluation Criteria

The criteria to be used to evaluate each Technical Proposal are listed in this section in descending order of importance.

Section 5.3-Financial Proposal Evaluation Criteria

Financial Proposals will be evaluated and ranked separately from the Technical evaluation.

Section 5.5-Selection Procedures

The Procurement Officer will recommend award of the contract to the responsible Offeror that submitted the proposal determined to be advantageous to the State. In making this advantageous to the State, technical proposals will receive equal weight with the financial proposals.

Section 5.6-Notice of Recommendation for Contract Award

The following documents listed under this section shall be completed, signed and submitted by the apparent awardee within five business days after receiving notification of award. Please carefully review this section.

Offerors/Bidders are asked to please read the section on the date, time and location of where to submit their proposals. Proposals are due no later than Thursday, July 7, 2016 by 2pm Eastern Standard Time. Please submit your proposals to the address indicate on the RFP Key Information Summary Sheet. No proposals will accepted after 2pm on July 7, 2016.

Please note that the proposals are to be delivered to the Department of Health and Mental Hygiene, 201 W. Preston Street, Rm 416, Baltimore, Maryland 21201, Attention: Queen Davis, Contract Officer, Office of Procurement and Support Services. Please address your packets and proposals to the Office of Procurement and Support Services, 201 W. Preston Street, Rm 416, Baltimore, Maryland 21201.

Section 4.3-Delivery

There are three delivery options:

- 1) U.S. Postal Service: Please make sure to get a receipt, signature and date stamp by the courier or mailroom.
- 2) Hand Delivery: Please make sure to get a receipt, signature and date stamp
- 3) Commercial Carrier: Please make sure to get a receipt, signature and date stamp

Please remember that after this Pre-Proposal Conference, Offerors/Bidders who have questions, please forward them to the Procurement Officer who in turn will forward to the Contract Officer for review and response. The questions and responses that are significant in nature will be posted on the eMarylandMarketplace website and the DHMH website. Please allow sufficient time for processing. If you have questions about the procurement process, please contact Queen Davis, Contract Officer at 410-767-5335 or email <http://dhmh.solicitationquestions@maryland.gov>.

C. Background, Purpose, Scope of Work-Terah Tessier

Department of Health and Mental Hygiene, Developmental Disabilities Administration is seeking a Contractor to conduct level of need assessments which will be used to determine an appropriate level of individual reimbursement to people who utilize services funded by the DDA on a statewide basis. The Contractor will complete a SIS assessment and the IIRA. DDA is currently doing a rate study; once completed, the rate study will be closed out. You will only be completing the SIS assessment. DDA has four regions in the State of Maryland; DDA also services 14,000 individuals. DDA is planning to have all individuals participant in an initial SIS assessment that is approximately 3000 SIS per year. Thereafter, DDA will complete the SIS assessments on individuals that may need an assessment or every five years unless there has been a significant change. Currently the assessment is being done in 3 phases:

- 1) Phase I-TY Individuals
- 2) Phase 2- Individuals in Self Direction and Individuals in Residential Services
- 3) Individuals in Day Habilitation Program

D. Questions and Answer

Question: Terilynn Murray, "In Section 3.2.2 and 3.2.3, Is the IIRS being done in person or is the SIS being done in person and not in paper format?"

Response: The SIS is being done in person.

Question: Katharina Lester, "Is the SIS Assessment currently being done in paper format?"

Response: The SIS Assessment is currently being done electronically through the AAIDD. The awardee must go through the AAIDD to be certified along with their trainers because it is a reliability tool.

Question: Katharina Lester, "What is the IIR?"

Response: IIR is a matrix tool used to determine the service funding. The SIS tool does not determine service funding. The SIS and the HRST tools determine the need for the service funding. The HRST tool will determine the support needs of the individual and the SIS tool will determine the funding for the support needs of the individual from the needs assessment.

Question: Jerry Jennings, "The assessment is to be done every 5 years as stated in the RFP?"

Response: Yes, every 5 years, starting with 3000 individuals per year

Question: “Significant Changes, How many significant changes are there currently?”

Response: It is a very low percentage. It is only done if there is a major significant medical need or life changes.

Question: Has the changes been staggered or is this new?

Response: New and is being done in phases; DDA has 14,000 individuals; the goal is to get 3000 assessments done per year to meet the criteria in the guidelines.

Question: Timetable for the Rate Study?

Response: End of January

Reminder:

Questions to Queen Davis, Contract Officer for OPASS with a copy to the Procurement Coordinator shall be submitted via <http://dhmh.solicitationquestions@maryland.gov>. Questions are requested to be submitted at least five days prior to the Proposal due date. The question and answers along with the conference minutes and conference documents will be posted on eMarylandMarketplace and the DHMH website.

Meeting ended at 10:45