

Pre-Proposal Conference Meeting Minutes

**DEVELOPMENTAL DISABILITIES ADMINISTRATION and OFFICE OF LONG-TERM
SERVICES AND SUPPORT (OLTSS)
FINANCIAL MANAGEMENT AND COUNSELING SERVICES (FMCS)**

OPASS 21-19022/eMMA# BPM024445

Conference began at 10:01 a.m. June 9, 2021

Opening Remarks and Introductions were facilitated by Jessica Fields, Contract Officer for the Office of Contract Management and Procurement (OCMP). This was a recorded virtual conference open to the public.

Attendance:

OCMP Attendees: Jessica Fields, Contract Officer; Theresa Ammons, Contract Officer; Janelle Robinson, MBE Liaison

DDA Attendees: Bernard Simons, Deputy Secretary; Patricia Sastoque, Director of Programs; Robert White, Director of Fiscal Services and Operations; Rhonda Workman, Director for Federal Programs; NaToya Mitchell, Statewide Coordinator of Self-Directed Services; Monica Hariri, Chief of Procurement

Meeting Summary

Agenda:

- Greetings/Introductions- Jessica Fields, OCMP
- Procurement Overview – Jessica Fields, OCMP
- MBE Overview – Janelle Robinson, OCMP
- Purpose – Rhonda Workman, Contract Monitor DDA & Marlana Hutchinson, Contract Monitor OLTSS
- Specification Overview –Natoya Mitchell Contract Monitor DDA & Marlana Hutchinson, Contract Monitor OLTSS
- Q & A
- Adjournment

Background

This meeting is to review the Request for Proposals for provision of “FINANCIAL MANAGEMENT AND COUNSELING SERVICES (FMCS)” The Department intends to make multiple awards (A minimum of Two and a maximum of 10 awards) as a result of this RFP. Please note an amendment further outlining this has been posted to this solicitation on eMMA and the MDH website. The contract resulting from this solicitation will be for duration of 3 year base period with 2 one-year option periods.

Purpose of RFP: Issued by the Maryland Department of Health (MDH) and the Soliciting Program is the Developmental Disabilities Administration (DDA). The Developmental Disabilities Administration (DDA) is issuing this Request for Proposals (RFP) to provide the establishment and implementation of a statewide contract for Financial Management and Counseling Services to include billing and claims, Electronic Visit Verification (EVV) per the federal Centers for Medicare Services and Medicaid (CMS) requirements for Personal Support Services, consulting and training for individuals self-directing their services.

Contract Goals: There is a 20% MBE goal and a 3% VSBE goal

Proposal Due Date: 7/12/2021

Questions Due Date: 7/5/2021

Overview of Procurement Process-Jessica Fields

In order to be considered for award a vendor must be “registered” on eMMA. Registration is free. Please review Subsection 4.2 for details.

Carefully review Subsection 4.3 Questions on page 54 regarding how to submit questions subsequent to this Pre-Proposal Conference. Questions to the Procurement Officer, , with copy to the Procurement Coordinator and myself shall be submitted via mdh.solicitationquestions@maryland.gov .

Carefully review the clause shown in subsection 4.23, page 48 **Payments by Electronic Funds Transfer**. By submitting a response to this solicitation, the 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 \$100,000. This section goes into detail on how to register or request an exemption.

The Procurement Method used for this solicitation is **Competitive Sealed Proposal**.

A. Proposal Format

Offerors are required to submit their response to the RFP in two parts. **Section 5-**

- **Proposal Format** (beginning on page 69) clearly lists all submission requirements.
- Volume I- Technical Proposal
- Volume II- Financial Proposal

Subsection 5.3- Proposals (page 55):

Volume I- Technical Proposal: lists all of the documents and information required with your Technical Proposal. The following number of Technical Proposals are required:

- 1 password protected electronic version in Microsoft Word Format; Password should be sent in a separate email and a 2nd electronic version as a searchable pdf document in the same format for Public Information Act (PIA) requests. This copy shall be redacted so that confidential and/or proprietary information has been removed.

Section 5.4- Volume- Financial Proposal (page 79);

In a separate from the Technical Proposal and clearly identified in the format identified in Section 5.2 “Proposals”, regarding the Financial Proposal, the Offeror shall submit

- 1 password protected electronic copy, in Excel.

The **Evaluation Committee, Evaluation Criteria and Selection Procedure** are outlined in Section 6 (beginning on page 80). Your proposals will be evaluated by a committee organized for that purpose and will be based on the criteria set forth in the RFP.

The **Technical Criteria**, listed in descending order of importance, can be found in Subsection 6.2 (page 80) with the **Financial Proposal Criteria** listed in Subsection 6.3.

The **Selection Procedure** is highlighted in Subsection 6.5 (page 81). As noted the contract will be awarded to the responsible Offeror that submitted the proposal determined to be the most advantageous to the State considering technical evaluation factors and price factors as set forth in the RFP. ***Please Note: The Technical and the Financial factors will receive equal weight***

Scope of Work Overview:

See the attached PowerPoint Presentation presented by Rhonda Workman.