

DEPARTAMENTO DE
SALUD



Puerto Rico Department of Health
Money Follows the Person
NEMT Analysis and Planning
Contractor
Request for Proposal (RFP)

2024-PRMP-MFP-NEMT-003

February 9, 2024

Table of Contents

1.	RFP QUICK FACTS SHEET	3
1.1	Summary of the RFP	3
1.2	Period of Performance	3
1.3	RFP Process Schedule	3
1.4	RFP Communications	4
1.5	Proposal Submission	4
2.	Overview	5
2.1	Background	5
2.2	Purposes	6
3.	Project Requirements	7
3.1	Scope of Work	7
3.2	Project Deliverables	13
3.3	Responsibilities	13
3.4	Initial Project Schedule / Work Plan	14
3.5	Vendor's Minimum Qualifications and Experience	14
3.5.1	Qualifications and Experience of Key Personnel	16
3.5.2	Ownership	16
3.5.3	Proof of Insurance	16
3.5.4	Conflict of Interest	17
3.6	Award according to PRMP best value	17
3.7	Reference Checks	17
3.8	Criteria	17
4.	Proposal Response Instructions	19
5.	Administrative and Judicial Review Process	20
6.	Attachment A: Cost Proposal	21
7.	Attachment B: Vendor Reference Form	21
8.	Attachment C: Subcontractor Reference Form	21
9.	Attachment D: Terms for filing an Administrative Review 3 / LPRA Section 9659	22
10.	Attachment E: SLA's, Performance Standards and Contract Remedies	22

Acronyms

Acronym	Definition
ADA	Americans with Disabilities Act
ASES	Administración de Seguros de Salud State Health Insurance Administration
CHIP	Children's Health Insurance Program
CMS	Centers for Medicare and Medicaid Services
CV	Curriculum Vitae
DSW	Direct Service Worker
LTSS	Long Term Service Support
MCO	Managed Care Organization
MFP	Money Follows the Person
NEMT	Non-Emergency Medical Transportation
PL	Project Lead
PMO	Project Management Office
PRDoH	Puerto Rico Department of Health
PRMP	Puerto Rico Medicaid Program
Q&A	Questions and Answers
RFP	Request for Proposal
TA	Technical Assistance
WBS	Work Breakdown Structure



1. RFP QUICK FACTS SHEET

1.1 Summary of the RFP

The Money Follows the Person (MFP) grant is a federal initiative in the United States aimed at helping individuals transition from institutional settings, such as nursing homes or other long-term care facilities, back into their communities. The program is designed to enhance the choice and independence of people receiving long-term care services.

PRMP does not currently fund NEMT benefit. Multiple studies show the importance of transportation availability in accessing healthcare. Improved transportation may also improve health equity, as increased access to care is provided to all. NEMT for the aged and disabled population can have additional challenges as individuals often have limited mobility and/or require some level of personal care or support while in transit to a medical appointment or while engaged in the medical appointment.

The Money Follows the Person Grant (the Grant) is soliciting assistance from interested entities in the NEMT Gap Analysis. Some of the goals of the Gap Analysis effort is to inform Puerto Rico and the congressional delegation of the inequities and gaps, and the estimated costs to address the deficiencies, help shape approaches to serving the islands changing demographic, help ensure equitable access to NEMT and design effective NEMT benefits that allow individual with complex needs to receive services at home or in the community.

Through this invitation, the Program is welcoming interest entities to propose to conduct an NEMT Gap Analysis.

1.2 Period of Performance

The term of the work is approximately eighteen (18) months, subject to formalization of an agreement between PRDoH and the selected vendor and the availability of funds.

1.3 RFP Process Schedule

RFP Released to Public	2/9/2024
Vendor's Written Questions Submission Deadline	2/23/2024 2:00pm
Questions Responses Posted.....	3/1/2024
Proposal Submission Due Date	3/25/2024 2:00pm
Notice of Intent to Award	4/26/2024

1.4 RFP Communications

Vendors must direct communications concerning this RFP to the following person designated as the Solicitation Coordinator and the email address for all solicitation communications:

Elizabeth Otero-Martinez: elizabeth.otero@salud.pr.gov

Only PRDoH's official written responses and communications with vendors are binding with regards to this RFP. Oral communications between a PRDoH official and one or more vendors are unofficial and non-binding. Vendors must ensure that PRDoH receives all questions and comments via email, including questions and requests for clarification, no later than the questions submission deadline detailed above.

1.5 Proposal Submission

Vendors should submit proposals in two distinct parts: technical and cost. Technical proposals should not contain any cost information relating to the services. Cost proposals should contain all cost information and should be sealed in a separate envelope from the technical proposal to facilitate a secondary cost proposal opening. In addition to printed copies of the technical and cost proposals, the vendor should submit **two (2) electronic copies of their technical proposal (PDF and Microsoft Excel, as appropriate) and cost proposal (Microsoft Excel)**. Please **submit separate USBs or other electronic media for both the technical and cost proposals for a total of four (4) USBs (two technical proposals and two cost proposals)**. Please submit two (2) printed copies of both the technical and cost proposals and be sure the technical and cost proposals are packaged separately.

Proposals should be submitted to the address below:

Puerto Rico Department of Health
Medicaid Program, ATTN: Elizabeth Otero-Martinez
268 Luis Muñoz Rivera Ave.
World Plaza – 5th Floor
San Juan, Puerto Rico 00918

2. Overview

2.1 Background

Money Follows the Person (MFP) is a federally funded Centers for Medicare & Medicaid Services (CMS) demonstration that supports states and territories in their efforts to transition Medicaid beneficiaries from living in institutional settings, primarily nursing homes, to living in the community. The MFP project's Community-based Long-Term Services and Supports (LTSS) emphasis aims to empower older adults and adults with disabilities to transition from institutional settings to home and community-based (HCBS) settings, while ensuring they have access to necessary non-emergency medical transportation services (NEMT). Typically, Medicaid agencies implement their MFP initiatives with NEMT networks already in place. That would not be the case in Puerto Rico since there is currently no Medicaid-funded NEMT benefit, and past implementation efforts in 2012 stopped because the federal cap on its Medicaid expenditures did not provide funding.

Municipalities in Puerto Rico may sometimes provide transportation, as may some nonprofits. San Juan is an exception in terms of its transit offerings. It has good access to highways and main roads. It also has mass transit in the form of a single train line that connects *San Juan*, Bayamón, and Guaynabo as well as the Metropolitan Bus Authority (AMA). Although this infrastructure is an important piece of the puzzle, it is not sufficient. Individuals who are aged or have disabilities may not be on mass transit routes or be able to use buses and trains without assistance or be able to drive themselves to appointments. Additionally, of the 78 municipalities in Puerto Rico, many are rural or semi-rural.

Recognizing the importance of this service to supporting HCBS, Puerto Rico would use MFP funds to plan for the implementation of an NEMT system. The NEMT contractor will initiate its work at the mid-point of the LTSS assessment, which will allow dovetailing efforts and collaboration with the other contractors. With continuing input from stakeholders and staff, the NEMT contractor will evaluate modes of transit system accessibility for the elderly and disabled, eligibility for transportation services, system costs and how services will be managed.

2.2 Purposes

Recognizing the challenges of transportation in Puerto Rico and the current lack of Medicaid funding for NEMT, the NEMT Analysis and Planning Contractor, with continuing input from stakeholders and MFP Project staff, will evaluate modes of transit, system accessibility for the elderly and disabled, eligibility for transportation services, system costs, and how services will be managed by the MFP Project. The NEMT Analysis and Planning Contractor will conduct a gap analysis to determine the non-emergency medical transportation needs of the Puerto Rico Long Term Services and Supports (LTSS) target population as compared to available transportation within Puerto Rico, which includes main island, and the island municipalities of Vieques and Culebra.

Under the supervision of the MFP Project Lead, the NEMT Gap Analysis Contractor will report to the NEMT Specialist, who will be responsible for managing the NEMT Gap Analysis contractor and will provide feedback and direction to the LTSS Needs Assessment and Technical Assistance (TA) components of the contract. The contractor will also assist the NEMT Specialist in the design and implementation plan for services related to Medicaid-funded NEMT to be included in the project's Operational Protocol (OP). The NEMT contractor will work closely with the NEMT Specialist and Advisory Committee experts to ensure that the OP is effective, culturally appropriate/sensitive, and realistic to the challenges and opportunities of implementing NEMT ground transportation in Puerto Rico.

The NEMT Analysis and Planning Contractor will support the NEMT Specialist by filling in gaps of expertise and provide recommendations on Medicaid-funded NEMT, including developing provider criteria, developing functional criteria for beneficiaries, developing payment methodologies and designing quality measures for services.

The NEMT Specialist will collaborate with stakeholders and will work with the MFP data and quality analyst to help ensure that all partners and systems can provide accurate, timely data necessary for required reporting and evaluation, as well as program planning and implementation. The NEMT Analysis and Planning Contractor will provide support in these areas as needed/requested.

3. Project Requirements

3.1 Scope of Work

PRMP is seeking to contract with a vendor with proven expertise conducting a transportation data gap analysis or comprehensive transportation studies or plans across the island of Puerto Rico.

The purpose of the gap analysis to seek input regarding:

1. Assess the quality of transportation services provided to patients, focusing on safety reliability and comfort during transit.
2. Measure the efficiency of transportation operations, including resource utilization, cost effectiveness and route optimization.
3. Evaluate the extent and adequacy of service coverage, ensuring accessibility for patients in different geographic areas and diverse needs.
4. Ensure compliance with state and federal regulations governing NEMT services, including safety standards and safety requirements.
5. Analyze transportation data to identify trends, and potential areas to be enhanced and generate reports.
6. Identify potential risks associated with transportation services, ensuring the safety and security of patients during their transit. And take into consideration the sustainability of said services during times of emergency by natural disaster (like hurricanes and earthquakes).
7. The NEMT analysis would include a review of available modes of transit, including mass transit, municipal and nonprofit on demand transit, ride sharing options, and informal friends and family options.
8. The analysis would review the availability of transit with respect to sufficiency and timeliness of services, current consumer cost and accessibility.
9. The Contractor will recommend modes of transit for PRMP to consider:
 - Qualifications for individuals or entities providing transportation,
 - How to help ensure the system is accessible to elderly and disabled riders,
 - How riders would be determined eligible for transportation services,
 - System costs,
 - How services will be managed.
10. The Contractor will review:

- The feasibility of using a transportation broker.
 - How would the brokerage system look like. Possible cost and infrastructure need for implementation.
 - How it would account for different regional needs.
11. The contractor will review the possibility of using innovative models such as the rideshare program staffed by volunteers and will recommend quality measures and contractor evaluation criteria.
 12. The contractor will evaluate the use of Medicaid administrative funding as opposed to program funding for supporting the eventual NEMT service costs and provide a comparison to PRMP, including the impact on Puerto Rico's annual Medicaid allotment.
 13. The contractor will identify cost-effective initiatives that can be implemented with no or limited additional funding and will assist PRMP with NEMT capacity building throughout the contract period.
 14. PRMP will establish a schedule for periodic status reports to help ensure timely implementation of capacity building effort and coordination with the overall TA contractor activities, during the contract negotiations for the NEMT contract.
 15. Four to six weeks prior to the conclusion of the NEMT contract, the contractor will submit a final report with the findings, recommendations and action plan to the MFP Team and MFP Advisory Committee.
 16. Cultural Competency Plan (CCP)
 - a. Develop a Cultural Competency Plan (CCP) section on the OP to improve cultural competence and language services for participants who might have a language barrier when receiving NEMT services.
 - b. The NEMT contractor shall establish policies that describe how to provide transportation for participants with disabilities and individuals in needs of dialysis and other critical medical care, that cannot be provided at home, during severe conditions such as severe flooding.

17. Capacity Building Activities

Throughout the LTSS Needs Assessment, TA, and NEMT activities, Puerto Rico will be identifying opportunities for capacity building. All contractors will be assisting PRMP with capacity building, which will include cost-effective elements that can be implemented with no or limited additional funding.

While the capacity building itself will not start until PRMP has initial information from focus groups and MFP Advisory Committee meetings, it is expected that capacity building planning will occur throughout the Grant and is likely to include areas such as:

- Identifying stakeholders and building and strengthening partnerships, including those with non-traditional stakeholders such as labor and housing authorities.
- Identifying which services along the LTSS continuum to prioritize for implementation.
- Identifying costs to implement LTSS and requesting needed federal funding.
- PRMP staff awareness and training regarding LTSS.
- Identifying any Commonwealth legislation needed to implement services.
- Developing outreach and public information materials that meet the communications and marketing standards of the Puerto Rico Department of Health.
- Developing provider reimbursement and payment methodologies.
- Developing and implementing DSW training and credentialing.
 - Family caregiver support and training
- Developing and implementing case management worker training and credentialing.
- Establishing a system for NEMT provider enrollment/credentialing.
- Developing an eligibility and assessment process, including functional eligibility.
 - Selecting a functional eligibility assessment tool
 - Training case management staff on the use of the assessment tool
- Identifying quality measure options and standards for continuous quality improvement.
- Training staff and providers.
- Developing policy manuals (DSWs, case managers, NEMT providers).
- Designing, developing, and implementing system modifications or new systems (subsystems) needed.
- Preparing Medicaid state plan amendments or waivers.

For this project to be successful the following must be accomplished:

A. Develop survey administration, execution, and analysis plan, to include:

- Survey methodology to assure randomization, validity, and coverage.
- Materials and methods for selecting and reaching participants.
- Size of the sample, with explanation of how the sample is representative.
- Materials and text for describing the survey effort to participants.

- Develop and refine survey questions, wording, and final tools in both Spanish and English. Surveys must comply with ADA (Americans with Disabilities Act) regulations to ensure accessibility for individuals with disabilities. This includes making the service content accessible to people with visual, auditory, or other impairments.
 - Survey administration using multiple methods in both Spanish and English and follow up.
 - Process for compiling and analyzing responses.
 - Process for comparative analysis with baseline scan findings as needed.
 - Development of tables and graphs for final scan document.
 - Writing final report content covering the scan process, comparative analysis, and findings.
 - Schedule for survey administration, follow up, analyses, and write ups.
 - Lead staff and staffing levels required for each task.
- B. Define/refine survey target groups and percentages for statistical validity, to include at a minimum:
- Elderly (60+)
 - People with disabilities (21+)
 - Caregivers
 - Transportation providers
 - Division of Medicaid
- C. Give support when requested with developing survey questions and final survey tools in English and Spanish.
- D. Conduct survey testing.
- E. Develop survey methodology and outreach:
- Determine all relevant survey methods to achieve maximum engagement and response rates (phone, mail, email, etc.).
 - Establish optimum survey administration timeline to achieve maximum engagement and response rates.
 - Compile current contact information for survey participants.
 - Identify outreach methods and timing to contact potential participants and obtain interest in/agreement to participate and alert when survey is open/closed.

- Plan for extra outreach as needed to obtain responses from under-represented and/or hard to reach provider types/locations (small/rural providers, non-automated providers, providers with no or limited broadband access).

F. Administer the survey using multiple methods:

- Conduct a survey using all relevant methods to achieve maximum response rates (phone, mail, email, etc.)
- Maximize survey completion within the provider groups and timelines established.
- Conduct multiples follow up contacts as needed to obtain sufficient responses from critical participants.
- Process completed surveys promptly (daily/weekly).

G. Compile and analyze survey responses:

- Compile survey responses and free text into a format and application for analysis.
- Review and clean up survey responses where needed/possible.
- Analyze responses and produce overall numbers and figures by provider type and other characteristics (e.g., geography, practice size).
- Review and share findings with the project team.
- Conduct any revisions/additional analyses post-review.
- Finalize findings.

H. Develop charts, graphs, dashboards that summarize findings and write up process for the final report:

- Create charts, tables, graphs, and other visuals as needed or requested by MFP Data Analyst.
- Write up final report content to include survey process, methodology, lessons learned, and findings.
- Assist in presenting findings to PRDoH management.

Upon award, PRDOH can provide the following resources:

- Final report requirements.
- Project support and oversight from the MFP Team.

I. Data hand-off:

The Contractor must do a transition of the NEMT gap analysis related information. Involves passing to the MFP Team the evaluation data, results, findings, and raw data. The Contractor cannot use the data of the NEMT analysis for other projects. Software or programs used by the contractor for statistical analysis will not incur additional costs and the contractor must provide weekly or monthly real-time data per request.

J. Geographical Information's Systems:

The contractor must provide PRMP with geospatial analysis software such as ArcGIS including Survey123. In addition, the contractor must provide the MFP staff with a user account in which the NEMT Specialist is able to create, develop, update, and manipulate data to ensure compliance with the project objectives. This analysis will provide the MFP staff with a comprehensive platform to view the data collected for the entire island.

K. Cultural Competency

The vendor must commit to ensuring a comprehensive and culturally sensitive approach to the island wide NEMT gap analysis taking into consideration the diverse cultural landscape, particularly within Puerto Rico and its island municipalities. The vendor must provide a group of evaluators or surveyors who are bilingual (English and Spanish speakers with native) with understanding of the Puerto Rican culture.

Establishing connections with community leaders, local organizations, and stakeholders will be integral. This engagement aims to foster trust, gather insights, and ensure the survey's relevance and effectiveness.

- The vendor and evaluators or surveyors should employ gap analysis tools and methodologies that resonate with the cultural context of Puerto Rico and its various regions, ensuring inclusivity and accuracy in data collection.
- Prior to initiating the survey, a comprehensive plan outlining the cultural competency strategy will be drafted and integrated into the overall evaluation process.
- Continuous support, guidance, and resources should be provided to evaluators or surveyors throughout the survey period to address any cultural challenges or questions that may arise.

The vendor, with the supervision and guidance of the MFP Lead, will continuously assess the effectiveness of the cultural competency plan, making necessary adjustments to ensure its alignment with the evolving needs and sensitivities of the communities being surveyed.

3.2 Project Deliverables

Deliverables identified for this project are as follows:

A. Project Schedule / Management plan

- The Project Schedule should be based upon initial approval of this deliverable by PRDoH. At minimum, the Project Schedule should be updated bi-weekly and delivered to the MFP Project Lead. The format of the reports will be discussed with the winning vendor. Submitted with each Project Schedule should be a document that details the changes made to the Project Schedule since the prior submitted version.
- The detailed schedule must be approved by the MFP Project Lead.
- Weekly status reporting to the MFP Project Lead.

B. Survey administration, execution, and analysis plan

- Survey methodology and target group numbers.
- Outreach plan.
- Bilingual survey administrators / outreach to target participants.
- Bilingual final survey tool(s) (**English and Spanish for Puerto Rico**).

C. Survey response findings

- MS PowerPoint presentation for the PRDoH.
- MS Word report for the PRDoH.
- Charts, graphs, tables, and text for the final report.

D. NEMT Gap Analysis Final Report

3.3 Responsibilities

The vendor’s project staff will work in collaboration with the MFP Project Lead to plan, manage, and administer project related activities from the start of the project through the contract closing.

Role	Responsibilities
PRMP	<ul style="list-style-type: none"> ○ Establish a Project Manager/team for project oversight. ○ Provide guidance and feedback during the project. ○ Provide requirements, priorities, concerns, relevant data, among others.

Role	Responsibilities
	<ul style="list-style-type: none"> ○ Assist with project tasks as needed/available.
Contractor	<ul style="list-style-type: none"> ○ Assign a Project Manager/Point of Contact to communicate with PRMP. ○ Develop relevant project documents such as: proposed methodology, tools, protocols, among others. ○ Conduct data collection activities, give support with analyses, reporting. ○ Sustain constant communication with PRDOH and MFP Team to ensure project flows efficiently, risks identified early, and feedback is addressed, among others. ○ Keep a Risk and Issue log as part of the Project Management and discuss with the MFP Project Lead in accordance with PRDoH's project management methodology.

3.4 Initial Project Schedule / Work Plan

Vendors should provide an Initial Project Schedule by project phase. This Initial Project Schedule should show all task details with responsibilities, timelines, durations, milestone dates, deliverable dates, and vendor personnel hours by deliverables for each project phase, personnel hours necessary by phase and deliverable, and all critical dependencies for the project's milestones and deliverables. Please provide those tasks that are on the critical path. Please provide the tasks that will require assistance from PRDoH resources. The Initial Project Schedule should be provided as an attachment to the vendor's proposal and tabbed as such in the submission.

At a minimum, the vendor's proposed Initial Project Schedule should include the following:

- Detailed tasks and timelines, outlining the major tasks planned by the vendor.
- The Work Breakdown Structure (WBS).
- The project schedule for all project deliverables and milestones.
- Identification of resources assigned as the responsible entity for each deliverable within the WBS to the level at which control will be exercised.
- Dependencies to task should be identified.

3.5 Vendor's Minimum Qualifications and Experience

Vendors shall provide **information regarding the firm/organization** so PRDoH can evaluate the vendor's ability to provide the services requested herein. At its discretion, PRDoH may require vendors to provide additional information and clarify information.

To be considered for award, a vendor must provide **evidence of their experience, including:**

- Description of the firm/organization and/or personnel assembled to complete the project.
- List of the evaluators or surveyors that will be across all the municipalities, including Vieques and Culebra.
- Submit at least two (2) analysis descriptions where similar services were rendered and included:
 - Developing and implementing a successful transportation data gap analysis or comprehensive transportation studies or plans across the island of Puerto Rico.
 - Developing and implementing survey administration and execution plan and methodology.
 - Conducting a successful large-scale survey.
 - Designing and testing statistically valid survey tools.
 - Conducting statistical multivariate analyses.
 - Provide samples of graphs, charts and other visuals.
- Demonstrate experience working with tight timelines.
- Provide evidence of compliance with all requirements by law to operate in Puerto Rico and contract with Puerto Rico Government.
 - Before the contract, the winning vendor must be registered with the “Registro Único de Proveedores de Servicios Profesionales” (RUP) from the Puerto Rico General Services Administration (ASG) and with the Puerto Rico Treasury Department (Hacienda) for the collection of sales and use tax (IVU) as a provider (if applicable) in the Sistema Unificado de Rentas Internas (SURI). The PRMP shall not award a contract, unless the vendor provides proof of such registration or provides documentation from the Puerto Rico Treasury Department that the vendor is exempt from this registration requirement in the SURI system. The foregoing is a mandatory requirement of an award of a

contract pursuant to this solicitation. For more information, please refer to the PR Treasury Department's web site <http://www.hacienda.pr.gov>.

- Certificate of good standing of the Department of State of Puerto Rico.
- Show compliance with other relevant Commonwealth and federal regulations.

3.5.1 Qualifications and Experience of Key Personnel

Vendors shall submit resumes for proposed Key Personnel to demonstrate evidence of relevant qualifications and experience necessary according to the scope of this RFP. Vendor personnel should have technical specialized expertise and be fully bilingual.

3.5.1.1 Staff Qualifications

The Vendor shall warrant that all persons assigned shall be employees of the Vendor (or specified Subcontractor) and shall be fully qualified to perform the work required. The Vendor shall include a similar provision in any contract with any Subcontractor selected to perform work under this contract. Failure of the Vendor to provide qualified staffing at the level required by the contract specifications may result in termination of this contract or damages.

3.5.1.2 Subcontractors

The Vendor shall be the primary vendor for the contract. PRDoH will not subcontract any work under the contract to any other firm and will not deal with any subcontractors. The Vendor is solely responsible for all actions and work performed by its subcontractors. All terms, conditions, and requirements of the contract shall apply without qualification to any services performed or goods provided by any subcontractor.

3.5.2 Ownership

PRDoH shall own all data, forms, procedures, and work products developed or accumulated by the Contractor under this contract. The Vendor may not release any materials without the written approval of PRDoH.

3.5.3 Proof of Insurance

Upon request, the Contractor shall present an affidavit of Worker's Compensation, Public Liability, and Property Damage Insurance to the Division of Purchases.

3.5.4 Conflict of Interest

The Vendor shall not knowingly employ, during the period of this contract or any extensions to it, any professional personnel who are also in the employ of the Commonwealth and providing services involving this contract or services similar in nature to the scope of this contract to the Commonwealth. Furthermore, the Vendor shall not knowingly employ, during the period of this contract or any extensions to it, any Commonwealth employee who has participated in the making of this contract until at least two years after his/her termination of employment with the State.

3.6 Award according to PRMP best value

The Buena Pro will be awarded in favor of the proposal that represents the best value for PRDoH and the government of Puerto Rico. Cost, although it is a core factor, is not decisive to award the good pro in favor of a participant.

3.7 Reference Checks

Please see sections seven (7) and eight (8), and Attachments B and C for more information.

3.8 Criteria

Proposals that comply with all requirements will be evaluated by a PRDoH appointed panel, according to a weight/score method. As part of its analysis, PRMP will give its highest consideration to the project approach and qualifications of proposed personnel. The evaluation committee will grant a score from 1 through 5 (1 being the lowest; 5 being the highest) according to their evaluation.

Criteria	Points
Experience: Proposers will be evaluated per their current and past experience and performance with comparable projects.	20
Qualifications of Proposed Personnel: The professional qualifications and accessibility of the firm's professional personnel to be assigned to manage and conduct the analysis.	30
Project approach: The proposal will be evaluated based on compliance with RFP requirements, technical approach in conducting analysis and public engagement, project schedule and strategy in completing tasks and providing deliverables.	40
Cost: This criterion considers the price of services solicited by this RFP. Proposers will be evaluated on their pricing scheme as well as on their price in comparison to other Proposers.	10
Total Points	100

To be evaluated, proposals must be:

- Received by the due date/time.
- Meet proposal style requirements.
- Follow proposal format.
- Be complete and have all supporting documents required.

4. Proposal Response Instructions

4.1 Proposal Format

Proposals shall include the following sections. Make sure to include in the cover letter the contact person name, title, and contact information.

- Project Proposal – Detailed description of proposed project per Scope of Work, including:
- Proposal summary: A brief summary of the proposal.
 - Executive summary – High level summary (1-2 pages max.) The vendor should include a title page stating the vendor’s intent to bid for this RFP, signed in blue ink by an authorized signatory legally binding the vendor and include it in the labeled “Original Proposal.”
 - Firm/organization information
 - Purpose, Mission, and Vision.
 - Description of relevant qualifications and experience.
 - Evidence of organizational capacity (e.g., leadership CVs, structure).
 - Leadership
 - Key project staff
 - Subcontractors (specify their roles and if offshore) as applicable.
 - References
 - Detailed scope of services, based on the information in this RFP.
- Cost/Budget
 - Detailed description of estimated expenses. (**Attachment A**).
- Appendices
 - Scope of work.
 - Two (2) project descriptions of similar projects.
 - Organizational Chart.
 - Qualifications of Team / Resumes/CVs of Key Personnel.

4.2 Proposal Style Requirements

- Arial, 12-point font; 1.5 spacing.
- One-inch margins.

- 8.5' x 11' Letter Paper size/portrait orientation.
- No page minimum or maximum.

5. Administrative and Judicial Review Process

Any person or party adversely affected or aggrieved by an award made regarding this Request for Proposal proceeding may, according to 3 L.P.R.A. § 9659, file a motion for reconsideration with the Puerto Rico Department of Health (PRDoH), within a term of ten (10) days from the date of the notification of the award. The-PRDoH must consider the motion for reconsideration within ten (10) business days of being filed. If any determination is made in its consideration, the term to request the appeal for judicial review will begin from the date on which a copy of the notification of the decision of the PRDoH is filed on record, according to the case, resolving the motion for reconsideration. If the filing date of the copy of the notification of the decision is different from that of the deposit in the ordinary mail or the sending by electronic means of said notification, the term will be calculated from the date of the deposit in the ordinary mail or sending by electronic means, as appropriate. If the PRDoH fails to take any action in relation to the motion for reconsideration within ten (10) days of its filing, it shall be understood that the motion was denied outright, and the time to request judicial review shall start to run from said date.

If the PRDoH accepts the reconsideration request within the term provided, it must issue the reconsideration decision or resolution within thirty (30) days following the filing of the motion. for reconsideration. If the PRDoH accepts the motion for reconsideration but fails to take any action in relation to the motion within thirty (30) days of its filing, it will lose its jurisdiction and the term to request the judicial review will begin from the expiration of said term of thirty (30) days. The Department of Health may extend said term only once, for an additional period of fifteen (15) days.

Any person or party adversely affected by a final reconsideration decision or resolution may file a petition for review with the Puerto Rico Court of Appeals within a term of twenty (20) business days of such final decision or determination being filed. See 3 L.P.R.A § 9672.

The mere presentation of a motion for reconsideration does not have the effect of preventing the PRMP from continuing with the procurement process intended within this Request for Proposal.

Challenges must be submitted using the form and according to the instructions in **Attachment D: Terms for Filing a Review** of this RFP and shall be considered waived and invalid if the objection has not been submitted as instructed in **Attachment D**.

6. Attachment A: Cost Proposal

Instructions: Attachment A: Cost Proposal

Vendor should complete the document titled as **Attachment A: Cost Proposal** with a detailed description of estimated expenses.

The Cost Proposal must be submitted separately from the Technical Proposal. **Be advised, PRMP may reject any proposal with a Cost Workbook that is reformatted and/or not separately sealed.**

The vendor's cost proposal should provide sufficiently detailed information to allow PRMP to assess the reasonableness of the vendor's cost for each defined component of the project.

7. Attachment B: Vendor Reference Form

PRDoH may conduct reference checks to verify and validate the past performance of the vendor and its proposed subcontractors.

Include at least two (2) references from projects performed within the last five (5) years that demonstrate the vendor's ability to perform the scope of work described in this RFP. The vendor should provide two (2) different clients/projects in order to demonstrate their experience.

Vendors should include project description, contract dates, and contact information (customer points of contact, addresses, telephone numbers, and email addresses). The vendor should explain whether it performed the work as a prime contractor or as a subcontractor.

Please see **Attachment B** for the Vendor Reference Form.

8. Attachment C: Subcontractor Reference Form

Subcontractor References (if applicable):

If the vendor's proposal includes the use of subcontractor(s), provide one (1) reference for each subcontractor. **PRDoH prefers references that demonstrate where the Prime and Subcontractors have worked together in the past.**

Please see **Attachment C** for the Subcontractor Reference Form.

9. Attachment D: Terms for filing an Administrative Review 3 / LPRA Section 9659

To file an application for administrative review according to 3 L.P.R.A Section 9659, the respondent must fill out and submit this form during the period established in Section 1.3: RFP Schedule of Events. If the form is not received during the period established in Section 1.3: RFP Schedule of Events, the application for review will not be considered.

Please see **Attachment D** for the Terms for filing an Administrative Review Form.

10. Attachment E: SLA's, Performance Standards and Contract Remedies

The SLAs contained herein cover the SOW stipulated in this RFP and the resulting Contract. The vendor should consistently meet or exceed performance specifications classified as SLAs between the vendor and PRMP. The section of the RFP contains expectations related to SLAs and implications of meeting versus failing to meet the SLAs, as applicable. In addition, this section contains minimum service levels required for the duration of the Contract.

SLAs and associated KPIs may be added or adjusted by mutual agreement during the term of the Contract to align with business objectives, organizational objectives, and technological changes. The vendor will not be liable for any failed SLAs caused by circumstances beyond its control and that could not be avoided or mitigated through the exercise of prudence and ordinary care, provided that the vendor immediately notifies PRMP in writing, takes all steps necessary to minimize the effect of such circumstances, and resumes its performance of the services in accordance with the SLAs as soon as possible.

The vendor should deduct any amount due as a result of the SLAs from their future payments, and those deductions should be made from the invoice total dollar amount. Each invoice should also be accompanied by an SLA Report detailing those SLAs that were triggered within the invoice period. Each invoice should detail the total invoice amount, the amount deducted due to the associated contract remedy, and the final invoice amount less the contract remedy. **PRMP reserves the right to seek any other remedies under the Contract.**