

**Money Follows the Person NEMT Analysis and  
Planning Contractor**

**2024-PRMP-MFP-NEMT-003**

**(Technical Proposal)**



03/25/2024

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**Prepared for: The Department of Health of Puerto Rico**

DEPARTAMENTO DE  
**SALUD**



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## Cover Letter

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Atte. Elizabeth Otero-Martínez

### **REF: Puerto Rico Department of Health Money Follows the Person NEMT Analysis and Planning Contractor**

Advantage Business Consulting and IPSOS partnered to form a multidisciplinary team of professionals with extensive experience, applying their areas of expertise to the Money Follows the Person NEMT Gap Analysis.

After reviewing the Request for Proposals (RFP) for the reference project, we are very interested in having the opportunity to provide our professional services for the NEMT Gap Analysis. Our professional experience and commitment to excellence make us a strong partner who could make a valuable contribution.

We believe that the proposal presented here satisfies all the requirements outlined in the Request for Authorization for the "NEMT Gap Analysis" issued by the Puerto Rico Department of Health. We fully believe that this proposal has been successful in presenting a structured project team with fully qualified professionals from two solid companies that are leaders in their respective fields. This is our biggest advantage. Collectively, this group of experts has worked on many projects of a similar nature over the years.

It was a pleasure to submit this proposal for your consideration. We are at your service! If you have any questions or concerns about this presentation, please feel free to contact me directly via email at [advantagepr@gmail.com](mailto:advantagepr@gmail.com).

Sincerely,



Vicente Feliciano, M. B. A.

President

## Proposal Summary

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### Executive Summary

**Advantage Business Consulting, Inc.** is the leading health economics and municipal transportation consulting firm in Puerto Rico. We have joined forces with **Ipsos Puerto Rico**, a market research firm, to provide comprehensive insights and realistic recommendations for the Medicaid Non-Emergency Medical Transportation challenges in Puerto Rico.

There is currently Medicaid-funded Non-Emergency Medical Transportation (NEMT) coverage in Puerto Rico, although more limited than what is observed in the United States.

Dual-eligible Medicare Medicaid patients in Puerto Rico are mostly Medicare Advantage participants. Therefore, they receive NEMT benefits which are partly funded by Medicaid. In addition, Puerto Rico Medicaid Managed Care Organizations (MCOs) offer NEMT to a limited number of beneficiaries, using a mixture of medical and socioeconomic criteria.

Advantage would hit the ground running by taking stock of the existing NEMT network, its capabilities, reach, and limitations. Advantage would leverage the work that is currently performing for the *Administración de Servicios de Salud (ASES)*, as well as Advantage's knowledge of players in the health industry, from insurance companies to health providers, from municipal mayors to NEMT providers.

"Medicaid covers rides for eligible individuals to and from the doctor's office, the hospital, or another medical office for Medicaid-approved care. This coverage is called "non-emergency medical transportation," because it does not involve a medical emergency. Medicaid may give you a ride if you do not have a car that works or do not have a driver's license. You may also be able to get a ride if you have a physical or mental disability or are unable to travel or wait for a ride alone. Coverage for these rides may be different depending on your situation and needs."<sup>1</sup>



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<sup>1</sup> [www.cms.gov](http://www.cms.gov)



## Firm Information

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Advantage Business Consulting, Inc., partnered with Ipsos Puerto Rico to provide comprehensive insights and recommendations for addressing the challenges of Medicaid Non-Emergency Medical Transportation (NEMT) in the region. Both firms will leverage their strengths within their respective fields to provide a multidisciplinary approach to the Gap Analysis while establishing the necessary connections to all the relevant stakeholders.

## Purpose, Mission, and Vision



**Advantage is the leading economics consulting firm in the healthcare sector and the leading municipal transportation consulting firm in Puerto Rico.** Clients run the gamut from the Puerto Rico Health Insurance Administration (ASES) to the PR Hospital Association, from medical residency programs to health insurance firms, from dialysis centers to primary health facilities. In the case of municipal transportation, Advantage has performed work in 18 municipalities in the past two years. This includes work in coastal municipalities such as Isabela, municipalities in the center of the island such as Utuado, and the work just started with the island municipality of Vieques.

This extensive experience in both healthcare and transportation consulting in Puerto Rico will allow the identification of key driver components of the supply and demand sides of the NEMT equation.

### **Our Mission**

Our mission is to support business and government decision-making with the best economic, business, and urban planning analysis. Our commitment is to provide our clients with the highest quality insights at a fair cost, driven by unwavering professional integrity.

### **Our Vision**

Our vision is to be the acknowledged leader in economic, business, and urban planning consulting services in Puerto Rico. The most successful and demanding players in the market will want our support. We take pride in our ability to attract top-tier professionals to our team, ensuring that we maintain our standard of excellence and deliver exceptional quality of service.



**Ipsos Puerto Rico, part of a global firm renowned for its expertise in market research,** will conduct comprehensive data gathering from the relevant stakeholders throughout Puerto Rico. Through surveys, interviews, focus groups, and data analysis, IPSOS will identify the transportation necessities and specific challenges that could potentially impact the implementation of NEMT.

The efforts of Advantage and Ipsos will support and enhance each other to provide the Department of Health - Medicaid with useful recommendations that consider the complexities of the local market. Our collaboration aims to address the specific NEMT problems faced in Puerto Rico and develop tailored strategies to overcome them.

#### **The 5 Core Values of IPSOS:**

- 1. Integrity** - Demonstrate the highest ethical standards and principles. We are independent, objective experts delivering reliable information to our clients.
- 2. Curiosity** - We are curious about the world around us. We ask the right questions; we seek the new and unexpected.
- 3. Collaboration** – All of us are smarter than any of us. We work in diverse teams comprising clients and colleagues. Together we navigate the world towards common goals with open minds.
- 4. Client First** – We put clients first. Always. We focus on long-term partnerships and we understand our clients' businesses as if they were our own. We are responsible and accountable for providing our clients with the best solutions across our specializations.
- 5. Entrepreneurial Spirit** – We are different. Our culture encourages individuals to try different, innovative ideas. We are motivated. We work hard and smart, and we are able to act quickly and decisively when required.

## Relevant Qualifications - Advantage Business Consulting, Inc.

**Advantage** is uniquely prepared to execute the work entailed by this RFP because we are:

- ✧ The leading health economics consulting firm in Puerto Rico
- ✧ The leading municipal transportation consulting firm in Puerto Rico

About a third of Advantage's work is related to the health sector. This entails many advantages for the client. For example, the firm is well known by the players in the industry, which opens doors when needed. Mr. Vicente Feliciano, president, has given conferences on the healthcare industry to the Colegio de CPAs, Chamber of Commerce, and PR Hospital Association, among others. He is also a member of the Board of Directors of NUC University, which has the largest nursing program in Puerto Rico and is a former member of the Board of Directors of the PR Institute of Statistics.

Another third relates to municipal transportation. This entails determining gaps between the needs of the target populations and the services provided. Advantage provides recommendations as to the transportation routes to be offered by the municipality, infrastructure investments and equipment required, as well as maintenance schedules and cost estimates.

Advantage is a company with a strong and proven track record in economic and business consulting. We count on a professional team of 19 individuals. Advantage has over 25 years of experience in strategic consulting for businesses, as well as conducting market studies, financial viability, economic-impact analysis, and business strategies. We also have a strong record of conducting studies of the health sector.



## **Relevant Experience (Projects)**

The following is a sample of relevant projects that demonstrate the TEAM's expertise and knowledge of the proposal's requirements.

### **Advantage Business Consulting - Transportation**

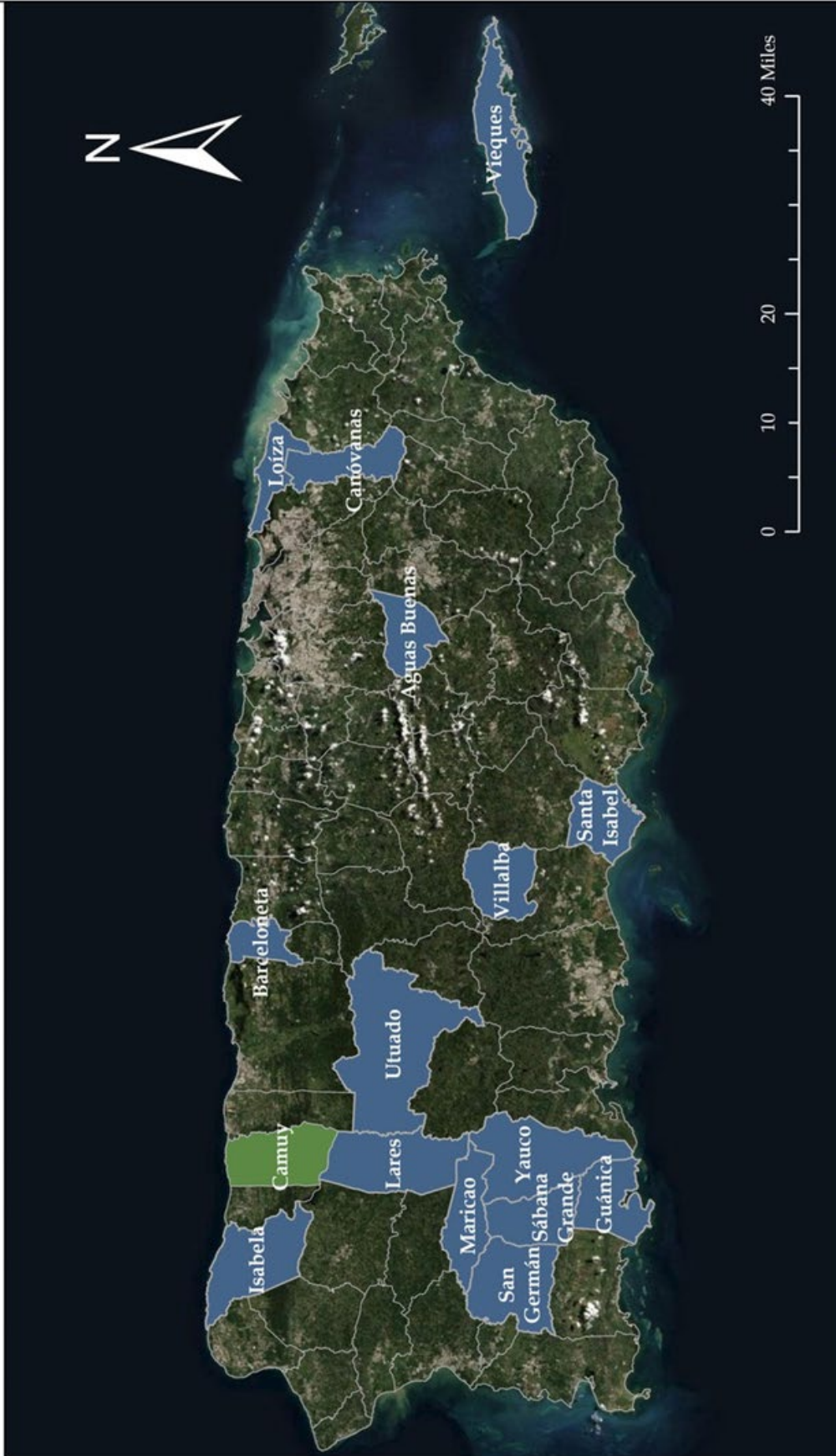
#### **A. Municipal Transportation Projects**

Advantage is the market leader in municipal transportation projects in Puerto Rico. Just in 2022 and 2023, Advantage developed or is in the process of completing transportation plans for many municipalities. The analysis considers different methods to address the population's needs and improve the resident's quality of life. This would include the transportation needs of the residents in every ward making sure that all citizens can benefit from the transportation system, as well as recommended strategies and alternatives to improve the mobility and access of the people and goods, which would foster economic development in the area. Multiple community outreach strategies are implemented throughout the process such as digital surveys, focus groups, and meetings, among others.

#### **B. Complete Streets**

Advantage is currently developing the Complete Street Policy for the Municipality of Camuy. The comprehensive study focuses on five primary routes established in the municipality, encompassing all aspects of complete streets such as traffic calming, pedestrian crossings, amenities, landscaping, streetscaping components, cycling areas and other elements that can complement and enhance the transit system while adhering to the Puerto Rico Complete Streets Plan & Design Guidelines.

# Municipalities with Transportation Projects in collaboration with Advantage



**Legend**

- Complete Streets
- Transit Plans
- Municipal Limits



## **Advantage Business Consulting - Health**

### **A. Health Insurance Administration (ASES) – Public Policy Analysis**

Advantage performed the technical analysis in order to request additional funding from CMS. The work performed by Advantage took an out-of-the-box approach, framing the arguments of ASES within the structure of something already accepted as a problem by CMS, circularity. Salaries in Puerto Rico health care industry is low because the payments provided by CMS are low.

Advantage also performed an analysis of the impact in the number of eligible Medicaid beneficiaries in Puerto Rico as a result of an increase in the income eligibility requirements. The analysis consisted of determining how many new beneficiaries would enter the program as a result of the increase in income eligibility and its impact on the budget of ASES.

### **B. Strategic Plan for Private Hospitals in Puerto Rico**

Advantage has performed strategy plans for various hospitals in Puerto Rico such as Hospital de la Concepción, Hospital CIMA-Aibonito, Hospital Ashford, Hospital Industrial and the San Carlos Health System. The strategies consisted of evaluating the operational statistics of the relevant hospital such as the daily census, occupation rate by department, length of stay (LOS), and visits to emergency rooms, among other statistics.

### **C. Certificate of Need (CON) for various health facilities**

Advantage has performed numerous CONs for different health facilities in Puerto Rico to comply with Regulation Number 9084 of the Puerto Rico Health Department. The facilities include hospitals, ambulatory surgical centers, clinical laboratories, diagnostic and treatment centers, and dialysis centers, among others.

### **D. Feasibility Study for various health facilities**

Advantage conducted feasibility studies for the establishment of various health facilities on the island. Advantage also performed several studies on medical office projects, including those at the Manatí Medical Center and Guaynabo Medical Mall, among others.

## E. Economic Analysis – Primary Health Centers

Advantage conducted an economic impact analysis of the Federal Qualified Health Centers (FQHC) in Puerto Rico.

### Advantage Business Consulting - Other

#### A. Whole Community Resiliency Program

Advantage is performing the Comprehensive Community Resilience Planning Program, funded by the U.S. Department of Housing and Urban Development through the CDBG-DR program, for the Municipality of San Lorenzo.

The following are the areas that are being evaluated as part of the project:

- ☑ Housing and community development
- ☑ Parks and recreation
- ☑ Society and environment
- ☑ Economic and community development
- ☑ Hazard mitigation and disaster recovery
- ☑ Transportation planning
- ☑ Other relevant planning experiences related to the development of community resilience strategies.



By evaluating the existing conditions, feasible recommendations will be made to promote the development, empowerment, and strengthening of communities to achieve greater resilience.



## Relevant Qualifications - IPSOS Puerto Rico

**Ipsos PR** has engaged in market research for several pharmaceutical companies in Puerto Rico, performing work from both the physician side and the patient side. It has partnered with NORC-University of Chicago, a research center, for health-related work on the island. Ipsos also worked on workforce issues related to the Puerto Rico police for the Office of the Technical Compliance Advisor (TAC).

Ipsos Puerto Rico is part of Ipsos's Caribbean and Central America Cluster and one of the most experienced research companies on the island.

Ipsos is the third largest company in the world in market and public opinion research. Ipsos produces and analyses information about societies, markets, people, brands, and ideas to offer its clients the data and tools to act and evaluate. The Ipsos group is global, specialized, and independent.

Ipsos offers standardized solutions and guarantees uniform quality in carrying out its research, whatever the business, organization, jurisdiction, and solution in question.

Hispania, a local research firm, was founded in 1985 and subsequently purchased by Ipsos. In 2005, the Ipsos Group acquired 51% of the shares of the company. The transaction was finalized in 2010 with the acquisition of the remaining 49% of the shares.

Ipsos Puerto Rico conducts surveys among several types of populations on the island, including:

- ☞ Public / consumers (Ex. Consumer Packaged Goods)
- ☞ Education professionals (Ex. Universities)
- ☞ Medical/health professionals (Ex. Pharmaceuticals)
- ☞ Business to Business (Ex. Professionals Association)



As a full-service market research agency, Ipsos Puerto Rico can provide a wide range of services, including:

- ✧ Developing survey samples
  - We design samples using local statistics professionals.
- ✧ An experienced team of supervisors and interviewers
  - Detailed data collection protocols and training are designed for all projects.
  - Pilots for each of the data collections are completed to validate instruments and quality.
  - Technology allows us to conduct a high-level quality control process, including recording of interviews and back data checks.
- ✧ Conducting large-scale, multi-community quantitative surveys (either in person, via phone using computer-assisted telephone interviewing, or using mixed methods)
  - Most of the projects conducted in Puerto Rico are done island wide, covering all the relevant U.S. Census regions.
  - Local quantitative projects average some 400 interviews. Nearly five percentage of projects each year have a sample of 1,000 interviews or higher.
  - We have the capacity to designate specific resources to large projects in order to achieve the client's expectations.
  - All face-to-face studies are done using tablets with internet access, which allows data to be received in real time directly to our secure data storage.
- ✧ Obtaining a pre-established number of complete responses for each survey instrument.
- ✧ For all our studies, we pre-establish a number of completed interviews.
- ✧ Ipsos has an office in San Juan, Puerto Rico, from where all local projects are coordinated, developed, supervised, and analyzed.
  - Puerto Rico staff oversees projects management.
  - We hold periodic meetings with clients.
  - We send progress reports to clients, and we notify them of any fieldwork situation that requires consultation.

Survey methods are undergoing profound changes: an increasing number of interviewers now use mobile terminals — tablets or smartphones – with continuous geo-location tracking. Computer Assisted Personal Interviewing (CAPI) and Computer Assisted Telephone Interviewing (CATI) continue to gain ground. What is more, the standardization of data collection platforms, combined with the sharing of best practices worldwide, simplifies procedures, increases productivity, and improves data quality and integrity. Ipsos is thus developing an original and efficient way of managing the process end-to-end.



## IPSOS Puerto Rico

### Relevant Experience (Projects):

#### A. Maternal and Child Health Study in Puerto Rico

Ipsos, Inc. performed the fieldwork for the U.S. Maternal and Child Health Bureau that hosted a MCH Block Grant Program aimed at improving the health of all mothers, children, and their families. The objectives of the study were to:

- ✧ Collect information on factors related to the well-being of children in Puerto Rico.
- ✧ Explore their health status, visits to healthcare providers, healthcare costs and health insurance coverage throughout the island.
- ✧ Identify factors related to the well-being of mothers.
- ✧ Obtain information on current health risk behaviors, health conditions and preventive health practices.
- ✧ Allow U.S. jurisdictions to better track priorities to improve the health of their maternal and children populations.
- ✧ Allow better annual reporting to the U.S. Congress on the jurisdictions' Title V program accomplishments.

#### B. Medical Value Drivers Study

Ipsos, Inc. performed a study among physicians for a pharmaceutical company to provide actionable guidance that informs about their strategies, training priorities and measure the progress of medical representatives and other key pharmaceutical employees who are in direct contact with HCPs.

The study had the objectives of determining what are the most valuable elements of field medical programs.

The sample was comprised of neurologists, gastroenterologists, rheumatologists, and oncologists, among others.



### **C. Dengue Vaccine Acceptability in Puerto Rico**

On behalf of a global pharmaceutical company, we conducted a research study about disease prevention and vaccinations in Puerto Rico. The main objective of the project was to measure attitudes towards Dengue Vaccination and Dengvaxia and obtain reactions to new vaccination program options.

The sample was comprised of general practitioners, family physicians, pediatricians, internists / internal medicine, immunization clinic healthcare professionals and pharmacists.

## **Evidence of Organizational Capacity'**


### **Key Project Staff**

#### **Advantage Business Consulting**

**Key team members:**

Vicente Feliciano

President & Founder

 (787) 751-1818

 chenti@abcpr.net

 <https://www.advantagepr.net/>

## Education

### **MBA**

*IMD Switzerland*

### **BA (Hons) in Economics**

*Harvard University*

## EXPERIENCE

Mr. Vicente Feliciano has more than 30 years of work experience including 15 as a management consultant in engagements requiring expertise in strategic planning and financial management.

Some of the consulting engagements led by Mr. Feliciano are:

- Advised on the business strategy of a financial institution.
- Submitted recommendations regarding the location of a new branch office and the optimization of certain internal processes. Recommendations were accepted because they were feasible to implement given the corporate culture and resources available to the institution.
- Performed an analysis of the fast-food industry for a financial institution. The report showed the trends in Puerto Rico, presented trends in the United States that would probably be replicated on the Island, and projected the performance of the different players.
- Participated in the selection of a turnaround strategy for a hospital. Tasks included assessment of short- and medium-term alternatives, as well as discussions with both management and medical faculty. Recommendations were accepted by the Puerto Rico management and presented to the head office.
- Advised on the reorganization of the marketing and sales efforts of a furniture manufacturing and import/distribution operation. Recommendations provided the corporate structure required to manage growth. They were realistic and considered the personal issues in this family-owned business.
- Performed analysis of the best use of the commercial property for a retailer. The company had two divisions. Advised on which division should operate in the commercial property and the tenant mix that would leverage this retailing business.
- Advised an Internet start-up company on strategy, positioning, and marketing efforts. Prepared business plans and supported negotiations with venture capitalists.

**Odalys arroyo**

Manager - Senior economist

 (787) 751-1818

 odalys@abcpr.net

 <https://www.advantagepr.net/>

## Education

### **MA. Business Management**

*Complutense University of*

*Madrid - Spain*

### **BA. Economics**

*University of Puerto Rico*

*May 2006*

## Experience

Odalys Arroyo, is a seasoned economic consultant with 15 years of experience in the field of business and economics. Her expertise allows her to assist companies in achieving their goals and objectives.

Currently, Mrs. Arroyo serves as the Manager for Advantage Business Consulting located in San Juan, Puerto Rico since 2008. Her duties include providing strategic analysis for both public and private health organizations, assessing short and medium-term alternatives, discussing new trends within the health industry, and conducting valuations.

Mrs. Arroyo has also been heavily involved in numerous projects geared towards meeting Puerto Rico's certification requirements for health facilities. She has worked on a variety of healthcare projects, including acute and intensive care units for hospitals, mental health facilities, radiology centers, and dialysis centers.

Moreover, Mrs. Arroyo has conducted best use and feasibility analysis for various real estate projects, such as shopping centers, condo-hotels, and housing developments. She has also prepared feasibility and strategic studies for cooperatives assessing new locations.

Additionally, Mrs. Arroyo has provided Impact and Economic Loss analysis for individuals involved in litigation related to pregnancy, age, discrimination, and sexual harassment. She has also managed projects, supervised junior staff, analyzed socio-economic impacts, and compiled, analyzed, and reported data to explain the economic and forecast market trends.





**Melissa Armas**

Manager - Senior economist

 (787) 751-1818

 melissa@abcpr.net

 <https://www.advantagepr.net/>

## Education

### MA. Economics

*University of Puerto Rico -  
Río Piedras Campus*

May 2021

### BBA. International Business

*University of Puerto Rico -  
Humacao Campus*

May 2017

## Experience

Ms. Armas has two and a half years of experience as a business and economic consultant, and has worked on various projects in this field. Her professional engagements include:

Manager, Advantage Business Consulting (June 2021-Present)/  
San Juan, Puerto Rico

- Supervising junior staff in the areas of economics and planning
- Conducting analysis and developing economic impact studies
- Leading research efforts
- Managing the project from start to finish

Junior Consultant, Advantage Business Consulting (June 2021-  
January 2023)/ San Juan, Puerto Rico

- Assisting with research and development of economic and business-related studies
- Preparing datasets and interpreting data

Graduate Research Assistant, University of Puerto Rico Río  
Piedras Campus (August 2019-May 2020)/ San Juan, Puerto Rico

- Gathering and analyzing information regarding accountability measures in Latin America and the UN Global Goals
- Completing administrative duties per professor request

Intern, Puerto Rico Trade and Export Company (June 2017-  
September 2017)/ San Juan, Puerto Rico

- Developing an exporting plan for the architectural firm Escala Corchado Arquitectos
- Performed an extensive market research effort to identify potential exporting markets such as the Dominican Republic, Florida, and Texas.





**Ms. Victoria López**

Ms. Lopez is a legal business consultant with BA degree in Economics and a Juris Doctor from the UPR-RP. She is a professional with expertise in both economics and legal affairs, making her a versatile consultant.



**Mr. Jim Torres**

Mr. Jim Torres is a statistician / demographer with an BA degree in Applied Statistics and an MS in Demography. He is a professional with expertise in both statistics and demography. His comprehensive knowledge includes data base knowledge making him a resourceful consultant.



**Mr. José Colón**

Mr. Colón is a business strategist with a MBA in Business Strategic Planning. Applying his areas of expertise and knowledge, makes him a professional in the areas of economics, business analysis and consulting.



**Mr. Miguel Torres**

Mr. Miguel Torres is a business statistician with a bachelor's degree in applied Statistics, Summa Cum Laude from the UPR-RP. He is a professional in the areas of statistics, administrative business and consulting.



**Ms. Karolina Cordero**

Ms. Karolina Cordero holds a Master's in Arts in International Relations with a minor in Geography. Ms. Cordero is currently one of the GIS technicians in Advantage.



**Ms. María Fontalvo**

Ms. Fontalvo has a MS degree in Industrial Engineer from the University of Puerto Rico-Mayagüez campus. With over 10 years of professional experience in data management and process improvement.



**Ms. Rahisa Delucca**

Ms. Delucca is a skilled demographer and planner holding two master's degrees in Demography and Planning (University of PR). With a solid background in community planning and demography, she adeptly combines research skills and data analytics to execute highly successful projects.



**Ms. Orializ Martínez**

Ms. Martínez is a geologist with a BA in Geology and GIS technician. She is a professional with expertise in Geospatial projects and urban planning, making her resourceful consultant in her area of expertise



**Ms. Stephanie Lugo**

Ms. Lugo is a demographer with a Masters in Science in Demography. With over 5 years of professional experience she combines her research skills and data analytics to complete highly successful projects.



**Mr. Rubén Maldonado, PPL**

Mr. Maldonado, a certified urban planner and skilled GIS technician who specializes in urban planning development and ArcGIS.



**Ms. María Ruiz**

Ms. Ruiz has a Bachelor's Degree in Administrative Science with over 20 years of professional experience. She is currently the head office manager in Advantage.



**Mr. Joshua Sierra**

Mr. Sierra is a GIS technician with a Bachelor's Degree in Geography. With over 8 years of professional experience he has the technical background to undertake diverse geospatial projects.



**Mr. Syrus Torres**

Mr. Torres is a professional economist with a Masters degree in Economics. He is a professional in the areas of economics, administrative business and consulting.



**Ms. Déxtera Fermín**

Ms. Fermín holds a Bachelor's Degree in Business Administration from the University of Puerto Rico and has over 25 years of experience in the field. Currently, she serves as the administrative support at Advantage.



**Mr. Rey González**

Mr. González is a marketing consultant with a BA in Marketing. He is a professional within expertise in business analysis and marketing, currently he is a marketing consultant in Advantage.



**Mr. José Rivera**

Mr. Rivera holds a Bachelor's in Science - Industrial Engineering from the Polytechnic University of Puerto Rico. With expertise in data management and process improvement.

## **Subcontractors**


Advantage Business Consulting, Inc. will be subcontracting Ipsos Puerto Rico to conduct the survey's pertaining to three of the five target groups. Ipsos Puerto Rico will also collaborate in the analysis of the compiled data to develop recommendations and strategies for the Gap Analysis.

## **Ipsos Puerto Rico**

### **Key team members:**

## Begoña Robledo

Service Line Director and Director of  
Healthcare for CCA (Central America and  
The Caribbean)

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## Education

### **MBA. Graduate School of Business Administration**

*University of Puerto Rico -  
Río Piedras Campus*

1985

### **BBA. School of Public Communications**

*University of Puerto Rico -  
Río Piedras Campus*

1982

## Experience

Ms. Robledo is a Research Coordinator with 7 years of experience. Proficient computer skills: Microsoft Package (Word, Power Point, Excel, Outlook Express). Excellent communication skills in English and Spanish, both written and verbal. Oriented on working with team, organize and multi-tasking.

Service Line Director and Director of Healthcare for CCA (Central America and The Caribbean), IPSOS (2017 - Present) / San Juan, Puerto Rico

- Management and development of marketing Research programs in Puerto Rico, the Caribbean and Latin America for the healthcare market and marketing programs.
- Program coordination and management for multi-country research in Latin America and the Caribbean, including the English-speaking Caribbean.
- Responsible for client relationships, account management, proposal writing and analysis.


Marketing Director, IPSOS (1985 - 2019) / San Juan, Puerto Rico

- Management and analysis of qualitative and quantitative market studies such as: concept and advertising reaction tests, attitude and usage studies, market segmentation, product placement, tracking studies.
- In-depth interviewing and focus groups analyst.



**Roxana Trabanco**

Managing Director

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 <https://www.ipsos.com/en-pr>

## Education

### **MA. Marketing and Sales**

*Escuela Europea de Negocios,  
Salamanca, España*

2007

### **BBA. Marketing and Advertising**

Pontifical Catholic University  
of Puerto Rico

2006

## Experience

Ms. Trabanco is Senior Research Specialist with 15 years of experience. Analytical reasoning abilities, intellectual curiosity, strong business acumen, superior organizational skills, meticulous attention to detail, and creativity in problem-solving. Expert knowledge of qualitative and quantitative market research methodologies.

Managing Director, IPSOS (2020 - Present) / San Juan, Puerto Rico

Responsible for the growth and development of the PR Operation.

- Capture and develop new business for clients throughout the Caribbean and Central America region.
- Act as a market research lead and intelligence partner, focused on providing strategic insights, and forming a trusted relationship with clients.
- Collaborate with the analytics team to address burning business questions and provide holistic recommendations to clients.
- Monitor and manage research programs and identify new business opportunities.
- Ensure all activities are conducted in accordance with financial and ethical compliance guidelines.

Account Director / Analyst - Connect Unit, IPSOS (2015 - 2019)/ San Juan, Puerto Rico

- Client service and sales responsibilities with a budget goal.
- Design research programs, including qualitative and quantitative methodologies.
- Monitor every stage of a study, from proposal to final presentation.
- Provide support to regional and global accounts.
- Manage the most important study in the food industry – Radiografía del Consumidor coordinated by MIDA.

Account Director / Analyst - Conect Unit, IPSOS (2015 - 2019)/ San Juan, Puerto Rico

- Client service support responsibilities.
- Coordinate and supervise fieldwork providers.
- Prepare data tables and reports.





## Education

### **BBA. Business Administration, MIS**

University of Puerto Rico -  
Río Piedras Campus  
1983

## Experience

Ms. González is a Research Coordinator with 7 years of experience. Proficient computer skills, Excellent communication skills in English and Spanish, both written and verbal. Team working oriented and organizational skills, multi-tasking. Effective to identify, analytical, receptive to change and focus on problem solving.

Researcher Coordinator, IPSOS (2017 - Present) / San Juan, Puerto Rico

- Project management, and coordination.
- Collect data on consumers, competitors, market and consolidate the information into actionable items, reports, and presentation.
- Responsible for the scheduling, overseeing all project phases, and delegating work to research assistants.

Ops Director, IPSOS (1991 - 2017) / San Juan, Puerto Rico

- Manage the operations of all research projects, quantitative and qualitative methodologies.
- Responsible for the management of all research projects in fieldwork, ensure quality controls, data cleaning and processing.
- Collaborate with statisticians and other professionals.

Data Processor and Scriptor, Hispania Research (1987 - 1991) / San Juan, Puerto Rico

- Script data entry of surveys, run the cleaning of the data, review data processing definition, run crosstabs, and do the quality of the results.



## References

The following are some references from the TEAM's relevant work experience:

### Advantage Business Consulting, Inc.

#### Reference

	<b>Puerto Rico Health Insurance Administration (ASES)</b> Roxanna Rosario, MPA Executive Director
	<b>Puerto Rico Fiscal Agency and Financial Advisory Authority (AAFAF)</b> Omar Marrero, Esq. Executive Director
	<b>Puerto Rico Hospitals Association</b> Mr. Jaime Plá-Cortés Executive President
	<b>Federal Transit Administration</b> Ms. Vivianet M. Arroyo Rosario, PPL Federal Coordination Office Consultant
	<b>International Executive Consultant LLC</b> Lorraine Bengoa Consultant



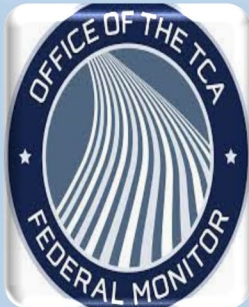
## IPSOS Puerto Rico

### Reference



#### **Puerto Rico Tourism Company**

Alexandra Ruíz Sánchez  
Chief Marketing Officer



#### **Technical Compliance Advisor (TCA)**

Javier González  
Administrative Director



#### **NORC at the University of Chicago**

Anna Wiencrot  
Senior Research Director Health Sciences

## Detailed Scope of Service

### Current NEMT for PR Medicaid Population

*“If you do not know where you are going, any road will get you there.”<sup>2</sup>*

The statement of the overview/background from the Department of Health’s Request for Proposals (RFP) is as follows: “Typically, Medicaid agencies implement their MFP initiatives with NEMT networks already in place. That would not be the case in Puerto Rico since there are currently no Medicaid-funded NEMT benefits, and past implementation efforts in 2012 stopped because the federal cap on its Medicaid expenditures did not provide funding.”

And yet, part of the Puerto Rico Medicaid NEMT demand is covered by a well-developed network that is already in place. The NEMT for the Puerto Rico Medicaid population comes through two programs.

Dual Eligible Medicare Advantage: Some 45% of the total Medicare population in Puerto Rico is also Medicaid. The health insurance companies offering the Advantage program (Medicare Part C) offer NEMT as part of the coverage. It is usually between 12 and 24 trips per year, with a round trip counting as two trips. Due to their socio-economic profile, the Medicaid population uses the service more frequently than the rest of Medicare Advantage beneficiaries. Just MMM makes some 600,000 total trips per year of which the majority is by Medicaid population.

Medicaid Only Population – To attract the Medicaid population to sign up with the different health plans and to save in utilization due to better case management, insurance companies offering Medicaid coverage are including NEMT as part of the coverage. However, it is limited, using medical and socio-economic criteria to approve the transportation.

The transportation offered covers a wide range of needs. It could be a medical appointment within the same municipality. It could be a beneficiary from the center of the

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<sup>2</sup> Alice in Wonderland - Lewis Carroll

island that needs to go to a city to see a specialist. It could be a resident of the island municipality of Culebra who needs transportation from his home to the pier in Culebra, from the pier in Ceiba to his/her appointment, and then back following the same process.

One of the market leaders in transportation is TransCita. Founded in 2008, it has a fleet of over 200 vehicles and over 500 employees. Like all large NEMT operations, it has a GPS system to optimize the use of vehicles and drivers.

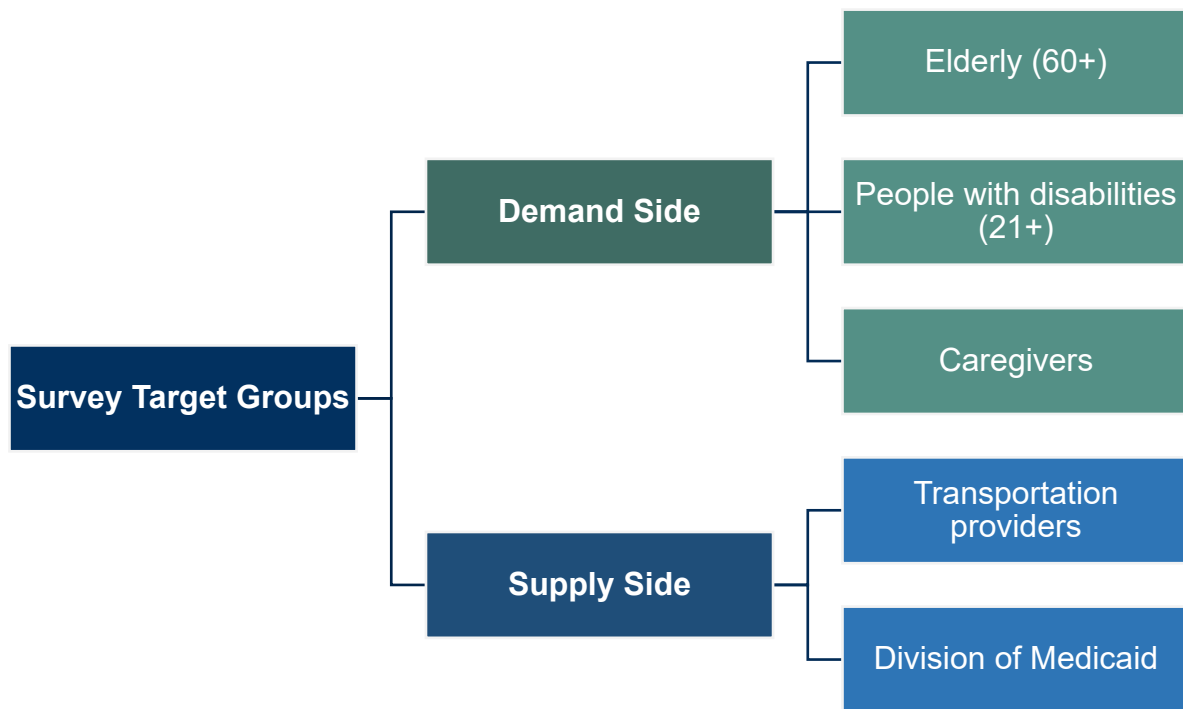
These services provided by MCOs are not sufficient to cover the demand of the Medicaid population. Either because the Medicaid beneficiary does not qualify for NEMT or because he/she used up the allocated trips, he/she might need additional support.

Into the breach come municipal transportation services. Different municipal governments have developed services to complement those provided by MCOs.

This is the platform upon which this proposal proposes to build. The key is to expand the NEMT service in such a way that helps Medicaid beneficiaries that at present fall through the cracks in the system. At the same time, rationalization of the service would allow savings in utilization on the part of Managed Care Organizations, allowing the expansion of the NEMT service while defraying part of the cost.

Since the objective of the study is to provide recommendations for NEMT, the research effort necessarily requires a loop between research of secondary sources (literature review, existing database analysis) with primary field research. It would be pointless to design and develop survey instruments without first understanding the NEMT issues in Puerto Rico, benchmarking this with the mainland United States, performing an analysis of relevant statistics, and reviewing previous studies on the subject.

Following the Scope of Work detailed in the RFP, the TEAM will divide the corresponding methodology by target group, (1) demand side and (2) supply side to play to each firm's strengths.



## Methodology - Demand Side

The TEAM determined that the best research methodology for the demand side is surveys, covering three target groups:



Elderly (60+)



People with disabilities (21+)



Caregivers

Close cooperation would be maintained with the Department of Health with the research pertaining to demand.

Research to be performed by Advantage, including benchmarks with the U.S., would provide the basis for the questionnaires to be used for the surveys.

Demographics are driving patient demand in Puerto Rico. While a population decline reduces demand, an older population requires more intensive care.

Managed care has been a driving force in managing demand in Puerto Rico. The Covid pandemic has brought technology, such as remote medical appointments, as an area of

opportunity to manage demand. Other options could be related to the time of the appointments, which in Puerto Rico have been traditionally managed with a first-come first-served system.

The survey could also capture information as to the experience of the patients during the Hurricane Maria emergency.

## Methodology for Data Collection

For the demand side study, IPSOS will recommend two methodologies, quantitative and qualitative methodologies:



**Quantitative Methodology**



**Qualitative Methodology**

The quantitative methodology will be conducted using the face-to-face interviewing technique, through household interviews, along with telephone interviews. The qualitative methodology will be conducted using the virtual focus groups methodology.

## Quantitative Phase

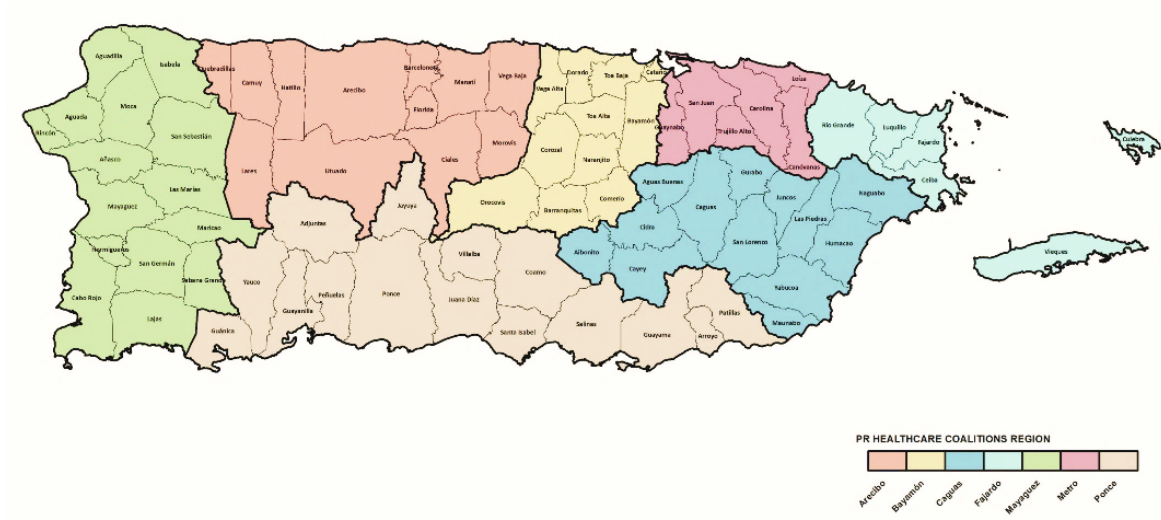
### Sample for Elderly (60+) Target Group

For this survey, the TEAM will present a sample option that will include 1,200 valid household interviews in Puerto Rico.

The margin of error for the 1,200-sample size option is 2.8% at a 95% significance level. Respondent eligibility will be defined as persons 60+ years with a Medicaid healthcare plan.

## Sample Design

**Geographical scope:** There are 7 regions as per the Puerto Rico Department of Health definition; San Juan, North, North Metro, Northeast, Southeast, Southwest, and West. The study will cover all 7 regions including the island municipalities of Vieques and Culebra. A random sample will be designed for this study.



Following the sample distribution per region and recommended sample size:

Regions	Proportion	Sample Size
North	16%	192
North Metro	15%	180
East	18%	216
Northeast	9%	108
Southeast	10%	120
West	5%	60
<b>Total</b>	<b>100%</b>	<b>1,200</b>

**Sampling:** a random walk strategy to select households in each selected sample point. A roster of household members 60+ years of age with Medicaid health plan



will be taken as part of the Survey; households with more than one household member qualifying for the interview will be selected randomly using the next birthday method. Part of the sample of this target group will be among persons who use the following modes of transportation other than their private vehicle such as:



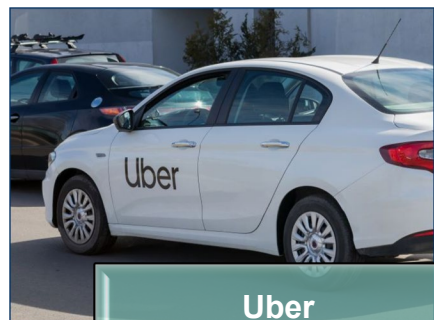
**Metro Train System**



**Buses**



**Municipal trolleys**



**Uber**



**Taxis**



**Ferry boats (island municipalities Vieques and Culebra)**



At least 30 cases will be interviewed in each region who qualify under this requirement.

Ipsos will generate a representative sample for Puerto Rico within the seven regions as defined by the Puerto Rico Department of Health. Ipsos will create the sample allocation across Puerto Rico in sample points (census enumeration areas, villages, city districts, neighborhoods, etc.). Ipsos will obtain and print (or load onto tablets if digital versions are available) maps of each sample point for field team use. Field teams will identify and select respondents in each of the sample points. Ipsos will develop a comprehensive and replicable selection methodology for enumerators to follow in the field.

Ipsos will do up to two revisits if the qualifying respondent is not available at the time of the visit to increase the response rate.

The telephone interviewing technique will also be used to increase response rates.

### **Sample for Caregivers and People with Disabilities (21+) Target Groups**

For these two surveys, Ipsos will present a sample option; that will include 350 valid household interviews in Puerto Rico.

The margin of error for the 350-sample size option is 5.2% at a 95% significance level.

For the caregiver's survey, respondent eligibility will be defined as:

*“Caregivers who take care of persons with Medicaid health care plan who need the help of caregivers”.*

and for the people with disabilities survey, respondent eligibility will be defined as any person with any disability and who have Medicaid health care plan.

Part of the sample will be among caregivers who accompany the target population to medical appointments and use the following modes of transportation other than their private vehicle such as:



Metro Train System



Buses



Municipal trolleys



Uber



Taxis



Ferry boats (island municipalities Vieques and Culebra)



NEMT provided by private medical insurance or paid out of pocket.

Given that there is no data of the universe of caregivers per region, the sample per region will have the same number of cases.

In the case of persons with disabilities 21+, a proportion of the sample will also be among persons who go to medical appointments and use the above modes of transportation other than their vehicle.

## Sample Design

**Geographical scope:** There are 7 regions as per the Puerto Rico Department of Health definition; San Juan, North, North Metro, Northeast, Southeast, Southwest, and West. The study will cover all 7 regions including the island municipalities of Vieques and Culebra. A random sample will be designed for this study.

**Sampling:** A random walk strategy to select households in each selected sample point. A roster of caregivers who take care of persons with Medicaid health plan who need the help of caregivers would be taken as part of the Survey; in households with more than one caregiver qualifying for the interview will be selected randomly using the next birthday method.

Ipsos will generate a representative sample for Puerto Rico within the seven regions as defined by the Puerto Rico Department of Health. Ipsos will create the sample allocation across Puerto Rico in sample points (census enumeration areas, villages, city districts, neighborhoods, etc.). Ipsos will obtain and print (or load onto tablets if digital versions are available) maps of each sample point for field team use. Field teams will identify and select respondents in each of the sample points. Ipsos will develop a comprehensive and replicable selection methodology for enumerators to follow in the field.

Ipsos will do up to two revisits if qualifying respondent is not available at the time of the visit in order to increase response rate.

The telephone interviewing technique will also be used in order to increase response rates.

## Data Collection

**Type of questionnaire:** Structured, mainly composed of close-ended questions with some open-ended questions.

The questionnaire will be developed considering all wording, and final tools in both Spanish and English. Surveys will 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.

The core questionnaire will be both in English and in Spanish.



✂ **Length of the questionnaire:** 20 - 25 minutes approximately.

✂ **Questionnaire programming:** Ipsos will program the survey instrument and loaded to be used for field work into the iField tablet software platform. Ipsos will test the tablet survey within Puerto Rico to ensure the software, uploading process, and data connections all work properly prior to training. This data could be transferred into the ArcGIS software for easier transferability with the MFP staff.

✂ **Questionnaire testing:** the questionnaire will be tested to assure it is clear to respondents.

## Training

To ensure proper selection and adequate training of field supervisors and interviewers, Ipsos will train the survey field staff.



Ipsos will recruit enough qualified field staff candidates to allow for trainees who will not successfully complete the training and for attrition during the field period (We will plan to train 10% more staff than we intend on using during field work).



## Survey Implementation Plan

**Interviewer staff:** Fieldwork will be conducted by interviewers with thorough experience in face-to-face interviews and public opinion surveys, who will be briefed by senior staff of Ipsos. In each interviewers' group there will be bilingual interviewers.

### Quality Control

1. **On-site monitoring** – Supervisors will complete routes with interviewers to identify areas of opportunity.

a. At least three (3) surveys per interviewer will be monitored at real time.

2. **On-site Back Check** – Supervisors will do in person validation. They will visit the participant household and complete the checklist.

a. At least three (3) surveys per interviewer will be validate in person.

3. **Telephone Back Check** – The internal quality team is going to make telephone validations of the checklist.

a. At least three (3) surveys per interviewer will be validated by phone.

☞ Validation (direct observation and/or checkbacks) will be performed on at least one in eight completed surveys.

☞ Tablet data uploads will be completed daily to Ipsos server. Ipsos will regularly review the data for data quality and irregularities and assess survey progress.

☞ Ipsos will submit weekly production reports with case dispositions and progress notes. Progress notes will describe any incidents and challenges confronted during the week of reporting.

☞ A short field report (less than 10 pages) on the field work will be prepared, including interviewer training, summary of fieldwork, and notes on data quality and problems encountered during survey implementation.

## Deliverables

- (1) Census extraction (or similar source of population estimates) for each region
- (2) Survey Implementation Plan and Monitoring and Oversight Plan
- (3) Feedback summary of finalized, translated questionnaires/moderator's guide for each language
- (4) Pre-test Report
- (5) List of survey interviewers team members and qualifications
- (6) Field Staff Training Materials
- (7) Weekly Production Reports during the field period and uploaded data
- (8) Field Report covering all phases of fieldwork
- (9) Data processing
- (10) Data file with collected raw data
- (11) Final analysis with a report that will include statistical analysis, charts, tables, and text.

## Qualitative Phase

For the qualitative phase virtual focus groups among the three target groups (elderly 60+, people with disabilities and caregivers 21+) will be conducted. We recommend conducting one focus group within each target group for a total of 3 virtual focus groups in each region. The groups will be conducted in the seven regions as defined by the Department of Health for a total of 21 focus groups.

The qualitative phase will be conducted through online focus groups with 1.5 hrs. approximate duration and with six to seven (6 to 7) participants per session. The focus groups will pursue the following dynamic:

- The online focus groups will be guided through a conversation setting, where participants can talk and share with each other and with the moderator their current medical-related transportation needs. They will also be subject to a variety of different types of questions in a more immersive way than ever before. This enhances the emergence of ideas, perceptions, and opinions, incorporating all the techniques of



offline focus groups to online with the benefits of seeing and hearing participants while interacting in real-time from their usual contexts.

- A moderator leads the conversation based on a discussion guideline/guide appropriate to the research objectives.
- The platform used is Microsoft Teams.
- We use a Webcam for in-context discussion; Screensharing for a co-browsing experience; Whiteboard for visual thinking and co-creation; Real Time to allow you to go global without traveling.
- A moderator's guide will be developed according to the objectives and submitted to the NEMT Specialist for approval.

## Methodology - Supply Side

The emphasis of this effort is to assess the quality of transportation services provided to patients, focusing on the quantity of transportation offered, safety, and efficiency, among others.

1. The initial effort would be concentrated on the Medicaid MCOs. It is important to obtain a profile of the services offered and the criteria used to provide this coverage.
2. GIS data would be developed as to the main routes covered by the Medicaid MCOs.
3. There would be benchmarks between the services offered by the PR Medicaid MCOs and the services received by the Medicaid population in the U.S.
4. An analysis of the inter-phase between the NEMT offered by the Medicaid MCOs and the NEMT offered by the different municipalities will be performed. There would be interviews with a representative sample of municipalities in order to determine areas of more direct collaboration between MCOs and municipalities.
5. Particular attention would be given to Vieques and Culebra because of the unique nature of their NEMT needs. Sometimes, due to medical conditions, NEMT involves air transportation. In fact, in the past, transportation costs have exceeded direct medical costs when air transportation is required.
6. The use of technology such as Telemedicine should be explored as an occasional alternative to NEMT. Benchmarks with what is being done in the U.S. would be explored.
7. In-depth interviews would be conducted with transportation companies, both the ones working for the Medicaid MCOs and the ones working for the municipalities. Some of the municipalities use in-house personnel. In these cases, municipality employees would be interviewed.



**TranCita**

**PRMT (Puerto Rico Medical Transport)**

**Advance Transportation**

**MCS Classicare**

**Cordmedic Transports LLC**

**Med Transport**

8. Discussions would be held with the different stakeholders as to their experiences during the Hurricane María emergency. This was a Category 4 hurricane that made landfall in Puerto Rico. The experiences of the different stakeholders would be used to develop resiliency in the NEMT. This is particularly important since data shows a major drop in medical utilization in the aftermath of Hurricane Maria and an increase in mortality thereafter.
9. Constant communication would be maintained with PR Medicaid officers.
10. Integrating existing medical transportation providers across Puerto Rico, including Vieques and Culebra, offers an opportunity to enhance healthcare accessibility. By leveraging their expertise and infrastructure, a unified Non-Emergency Medical Transportation (NEMT) system can efficiently serve individuals with medical needs throughout the region. This collaborative approach fosters tailored solutions, optimized routes, and seamless coordination, ultimately improving healthcare outcomes and quality of life for all residents in Puerto Rico.

## Methodology – Gap Analysis and Recommendations

The thrust of this effort is to bring together the previous research into a coherent set of recommendations.

1. The TEAM would combine the previous work, the Demand Analysis, and the Supply Analysis in order to generate the Gap Analysis. The analysis would cover three main themes related to NEMT: quantity of the service, quality of the service, and funding for the service.
2. The last one, funding for the service, is particularly important. The TEAM strives to perform work for implementation, not for archives. Therefore, an effort would be made in order to provide recommendations as to possible efficiencies and pay-for. One area of opportunity is a better inter-phase between the MCOs NEMT and the NEMT provided by municipalities. Another is if more or better NEMT impacts patient care and utilization.
3. Starting from the existing eligibility and assessment process used by the Medicaid MCOs, the TEAM would work to streamline this process.
4. While capacity building would occur throughout the process, it would be given particular attention during the Gap Analysis.
5. The staff of the Puerto Rico Medicaid Program would be trained as to the present situation of NEMT and potential areas of improvement. Also, the TEAM would develop outreach and public information materials that meet the communications and marketing standards of the Puerto Rico Department of Health.
6. Leveraging its experience with developing resiliency programs, Advantage would make recommendations to enable NEMT to continue as normal as possible throughout emergencies such as hurricanes.
7. Present Puerto Rico legislation would be reviewed in order to recommend possible modifications required in order to implement the NEMT recommended program.
8. Write-up of Medicaid state plan amendments and/or waivers required.

## Attachment A (Cost / Budget)

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See excel file "Attachment A - Cost Proposal" for more details.



# DEPARTMENT OF HEALTH

## PUERTO RICO MEDICAID PROGRAM

### Attachment A- Cost Proposal 2024-PRMP-MFP-NEMT-003

#### Instructions:

- ✓ Please, provide the information requested in Table 2. Vendors may propose additional phase description items. All the phases are part of the gap analysis final report. Include a detailed description of estimated expenses by line item/schedule (examples in Table 1). These are suggested categories. Vendors may insert additional categories, if necessary.
- ✓ Table 2. is divided into four (4) categories, under each one, please list all the components and costs.

**Table 1.**

<b>Category</b>	<b>Description</b>
<b>Personnel costs</b>	Breakdown of costs related to personnel involved (including evaluators or surveyors for data recollection) in the NEMT gap analysis (please include positions).
<b>Data collection and analysis</b>	Estimate cost for collecting data, conducting research and performing statistical analysis.
<b>Reporting and documentation</b>	Provide a breakdown of costs by phase of the NEMT gap analysis final report with timeline to show when expenses will be incurred.
<b>Contingency</b>	Include contingency budget for unexpected expenses.
<b>Other costs</b>	If applicable, please provide any other necessary cost(s).
<b>Total estimated cost</b>	Summarize all the costs to provide a total estimated budget for the NEMT gap analysis.

PO Box 70184, San Juan, PR 00936-8184

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[www.salud.gov.pr/medicaid](http://www.salud.gov.pr/medicaid)



**DEPARTMENT OF HEALTH**  
 PUERTO RICO MEDICAID PROGRAM



**Table 2.** List items and costs for each phase. Vendor may insert additional rows, if necessary.

Phase	Phase Description	Cost
<p><b>Phase I</b>            NEMT gap analysis Plan            (Work Plan)</p>	<ul style="list-style-type: none"> <li>I. Initial project schedule plan (timeline) See section 3.4 of the RFP.</li> <li>II. Background Research               <ul style="list-style-type: none"> <li>a. Current transportation data and develop an assessment of needs and opportunities within the transportation sector.</li> <li>b. Current transportation services challenges in Puerto Rico for the target population.</li> <li>c. Compare Puerto Rico NEMT brokerage models to existing ones in other states.</li> <li>d. Develop tools and evaluate the current state of Puerto Rico NEMT needs for the population of interest in all 78 Municipalities, including Vieques and Culebra.</li> <li>e. Transportation Infrastructure in Puerto Rico.</li> <li>f. Partner agencies for NEMT in Puerto Rico.</li> </ul> </li> <li>III. Determine existing data and methods for new data recollection to fill in the current gaps needed to validate the NEMT necessities on the island.</li> <li>IV. Stakeholder Engagement</li> </ul>	





# DEPARTMENT OF HEALTH

## PUERTO RICO MEDICAID PROGRAM

Phase	Phase Description	Cost
<p><b>Phase II</b> Identify Gaps (Conduct gap analysis)</p>	<ol style="list-style-type: none"> <li>I. The vendor must describe how they will conduct the data gap analysis (e.g., techniques, resources, methodology) to identify the strengths and challenges of NEMT in Puerto Rico.</li> <li>II. Create geospatial database of existing NEMT services used in Puerto Rico to see the municipalities that have the greatest needs as well as be able to create a geospatial analysis such as and not limited to marking the distance between the medical services used and the patients place of origin (residence).</li> </ol>	
<p><b>Phase III</b> Record, Review, consolidate and analyze recollected data.</p>	<ol style="list-style-type: none"> <li>I. Vendor must describe how they will record, review, analyze, and consolidate data (see section G and H in p.11).</li> <li>II. The vendor must provide a geospatial analysis of the NEMT transportation data to assess where the service is most needed on the island.</li> </ol>	
<p><b>Phase IV</b> Findings and Recommendations</p>	<ol style="list-style-type: none"> <li>I. Document findings and provide recommendations from gap analysis.               <ol style="list-style-type: none"> <li>a. Barriers, challenges, and possible solutions.</li> <li>b. Analysis of the current transportation models available and possible ways to complement these with NEMT program.</li> <li>c. Synthesis of research and stakeholder outreach.</li> </ol> </li> <li>II. Outline conclusions from gap analysis.</li> <li>III. Recommendation of possible implementation method (e.g. possible brokers, design, and possible funding opportunities).</li> <li>IV. Outline potential next steps for PRMP to implement NEMT.</li> <li>V. Recommendations.</li> </ol>	
<b>Total Cost:</b>		

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## Attachment B



2024-PRMP-MFP-NEMT-003  
Money Follows the Person NEMT Analysis and Planning Contractor



## NEMT- Attachment B

**The vendor is NOT to change any of the pre-filled cells in the following tables.**

**The vendor may add additional reference tables as necessary.**

### Vendor Reference Form

Vendor Information	
<b>Vendor Name:</b> Advantage Business Consulting, Inc.	Contact Name: <b>Vicente Feliciano Pérez</b>
	Contact Phone: <b>787-751-1818</b>
Customer Information	
<b>Customer Organization:</b> Puerto Rico Health Insurance Administration (ASES)	Contact Name: Roxanna Rosario, MPA
	Contact Title: Executive Director
<b>Customer Address:</b> PO Box 195661 San Juan PR 00919-5661	Contact Phone: (787) 474-3300
	Contact Email: rrosario@asespr.org
Project Information	
<b>Total Vendor Staff:</b>	<b>19</b>
<b>Project Objectives:</b> Public Policy Advisory and Medicare Funding Analysis for ASES	
<b>Project Description:</b> Advantage regularly advises ASES on a range of public policy issues, from the availability of physicians to the implementation of Medicaid DRGs for hospitals. Advantage developed the technical analysis for the request for additional Medicare funding by the Government of Puerto Rico to the Centers for Medicare and Medicaid Services.	
<b>Vendor's Involvement:</b> Expertise in public policy and technical analysis for Medicare Funding Request.	
<b>Project Benefits:</b> Advantage's technical analysis helped to identify the implications of "circularity" in the local context. The analysis highlights the need to revise the wage index since salaries in healthcare occupations throughout Puerto Rico are significantly lower than in the United States. If the request is approved this will result in a long-awaited revision of healthcare wages and will reduce significant financial pressure on all local healthcare facilities.	
Key Personnel	
Name: Vicente Feliciano Pérez	Role: President & Founder
Name: Odalys Arroyo	Role: Manager – Senior Economist
Project Measurements:	
Estimated one-time costs: \$32,500	Actual one-time costs: \$32,500
Reason(s) for change in one-time cost: N/A	
Original Value of Vendor's Contract: \$140,000	Actual Total Contract Value: \$140,000
Reason(s) for change in value: N/A	

## NEMT- Attachment B

Estimated Start & Completion Dates:	From:	February 06, 2024	To:	February 28, 2024
Actual Start & Completion Dates:	From:	February 06, 2024	To:	February 28, 2024
Reason(s) for difference between Estimated and Actual dates: N/A				
If the vendor performed the work as a Subcontractor, the vendor should describe the scope of subcontracted activities: N/A				

## NEMT- Attachment B

**The vendor is NOT to change any of the pre-filled cells in the following tables.**

**The vendor may add additional reference tables as necessary.**

### Vendor Reference Form

Vendor Information		
<b>Vendor Name:</b> Advantage Business Consulting, Inc.	Contact Name:	Vicente Feliciano Pérez
	Contact Phone:	787-751-1818
Customer Information		
<b>Customer Organization:</b> Puerto Rico Financial Advisory Authority and Fiscal Agency (AAFAF)	Contact Name:	Omar Marrero, Esq.
	Contact Title:	Executive Director
<b>Customer Address:</b> Roberto Sánchez Vilella (Minillas) Government Center de Diego Ave. Stop 22 San Juan, PR 00907	Contact Phone:	(787) 722-2525
	Contact Email:	omar.marrero@aafaf.pr.gov
Project Information		
<b>Total Vendor Staff:</b>	19	
<b>Project Objectives:</b> Develop Index on Social Vulnerability of the Population and the Economic Capacity of Municipal Structures		
<b>Project Description:</b> <p>This was a critical effort by the municipalities and the central government of Puerto Rico. The task was to develop an alternative to the \$270 million <i>Fondo de Equiparación</i>, a source of funding from the central government to the municipalities. The Federal Oversight and Management Board determined to phase it out. Part of the problem was that the distribution of this fund was somewhat.</p> <p>Advantage argued that some municipalities have large vulnerable populations and a limited financial capacity to service these populations. Regardless of whether Comerío, Adjuntas, or Loíza have a top-notch execution of their municipal affairs, they would not have the means to generate the necessary economic development strategies to service their population.</p> <p>Advantage leveraged the U.S. Centers for Disease Control's Social Vulnerability Index (CDC SVI). The SVI is calculated for the residents of all municipalities in the United States. This Index uses data from the U.S. Census Bureau and is updated every two years. The SVI uses 16 variables that are organized into four groups: housing type and transportation, household characteristics, socioeconomic status, and racial &amp; ethnic minority report.</p> <p>The Essential Services Fund was focused on ensuring that essential services were provided to all the resident population in each municipality. Eventually, the FOMB approved an assignment of funds to the municipalities using the framework developed by Advantage as a guideline for this distribution.</p>		
<b>Vendor's Involvement:</b> Advantage developed the necessary methodology that was later used by the Financial Oversight and Management Board (FOMB) to distribute a new Essential Services Fund for the 78 municipalities.		
<b>Project Benefits:</b> Through this project, the FOMB approved an assignment of funds to the municipalities using the framework developed by Advantage as a guideline for this distribution. The new Essential Services Fund was focused on ensuring that essential services were provided to all the resident population in each municipality.		
Key Personnel		

## NEMT- Attachment B

Name: Vicente Feliciano Pérez		Role: President & Founder	
Name: Odalys Arroyo Melissa Armas		Role: Manager – Senior Economist Role: Manager – Senior Economist	
<b>Project Measurements:</b>			
Estimated one-time costs: \$116,300		Actual one-time costs: \$116,300	
Reason(s) for change in one-time cost: N/A			
Original Value of Vendor's Contract: \$430,000		Actual Total Contract Value: \$430,000	
Reason(s) for change in value: N/A			
Estimated Start & Completion Dates:	From:	September 6, 2022	To: April 11, 2023
Actual Start & Completion Dates:	From:	September 6, 2022	To: April 11, 2023
Reason(s) for difference between Estimated and Actual dates: N/A			
If the vendor performed the work as a Subcontractor, the vendor should describe the scope of subcontracted activities: N/A			

## Attachment C



2024-PRMP-MFP-NEMT-003  
Money Follows the Person NEMT Analysis and Planning Contractor





# NEMT- Attachment C

## Subcontractor Reference Form-1

Subcontractor Information	
<b>Vendor Name:</b> <b>IPSOS, INC.</b>	<b>Contact Name:</b> Roxana Trabanco
	<b>Contact Phone:</b> 1-787-753-8370
Customer Information	
<b>Customer Organization:</b> Puerto Rico Tourism <i>Company</i>	<b>Contact Name:</b> Alexandra Ruíz Sánchez
	<b>Contact Title:</b> Chief Marketing Officer
<b>Customer Address:</b> Paseo de la Princesa FV7M+9CV, Paseo de la Princesa, San Juan, 00901, Puerto Ric	<b>Contact Phone:</b> 1-787-721-2400
	<b>Contact Email:</b> alexandra.ruiz@tourism.pr.gov
Project Information	
<b>Total Vendor Staff:</b>	30-50 persons. Includes fieldwork staff.
<b>Project Objectives:</b> Understand the current mindset of Puerto Ricans towards internal and external tourism options, to find barriers and opportunities that will be fulfilled with promotional strategies and actions for a Puerto Rico as a tourist destination among locals	
<b>Project Description:</b> With this objective in mind, we conducted the first phase of this marketing program with 3,000 personal household interviews across all the Island, virtual focus groups and virtual in-depth interviews. The sample was comprised of adults who have interacted with any stakeholder within the PR Tourism company: Restaurants, Transportation, Accommodation, Shopping, Travel, and Recreation and Attraction Services in the last 24 months. A segmentation analysis using choice-based conjoint analysis was included as part of the study analysis.	
<b>Vendor's Involvement:</b> Conduct all the fieldwork, quantitative and qualitative, do the coordination and analysis of all this work and make presentations of the preliminary results in the Next Puerto Rico Tourism Summit 2023.	
<b>Project Benefits:</b> The study provided to the PR Tourism Company with enough information to begin working with its marketing plan for 2024 marketing strategies and for the next promotional strategies for the local tourism campaigns.	
Key Personnel	
Roxana Trabanco	Managing Director
Begoña Robledo	Service Client Leader
Project Measurements:	
Estimated one-time costs: Confidential information	Actual one-time costs:
Reason(s) for change in one-time cost:	
Original Value of Vendor's Contract: Confidential information	Actual Total Contract Value:

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Reason(s) for change in value:				
Estimated Start & Completion Dates:	From:	May 2023	To:	August 2023
Actual Start & Completion Dates:	From:	May 2023	To:	August 2023
Reason(s) for difference between Estimated and Actual dates:				
If the vendor performed the work as a Subcontractor, the vendor should describe the scope of subcontracted activities:				

# NEMT- Attachment C

## Subcontractor Reference Form-2

Subcontractor Information		
<b>Vendor Name:</b> <b>IPSOS, INC.</b>	Contact Name:	Roxana Trabanco
	Contact Phone:	1-787-753-8370
Customer Information		
<b>Customer Organization:</b> Technical Compliance Advisor (TCA)	Contact Name:	Javier González
	Contact Title:	Administrative Director
<b>Customer Address:</b> 1225 Ave. Ponce de Leon VIG, Tower, PH – 924 San Juan, 00907, Puerto Rico	Contact Phone:	787-417-9098
	Contact Email:	jgonzalez@fpmpr.org
Project Information		
<b>Total Vendor Staff:</b>	25 to 40	
<p><b>Project Objectives:</b> To ensure the protection of civil rights, strengthen relations with the communities, train the members of the Puerto Rico Police Bureau in the best police policies and practices, and provide them with the necessary tools to the fight against crime, which will guarantee public safety.</p> <p>The three key objectives for this study:</p> <ul style="list-style-type: none"> <li>•The United States Department of Justice (USDOJ) established an agreement with the Government of Puerto Rico and the PR Police Bureau (PRPB) for the Sustainable Reform of the Puerto Rico Police Department, where in one of the dispositions the PRPB is obligated to undertake, with the supervision of a court appointed Monitor and the oversight of the USDOJ.</li> <li>•The Reform Agreement was reached in order to implement reforms that are designed to ensure constitutional policing, promote public safety, and strengthen public trust in PRPB.</li> <li>•The office of the Monitor has requested a survey which should include three phases, one of which is a comprehensive survey of the community in Puerto Rico</li> </ul>		
<p><b>Project Description:</b></p> <p>The sampling frame of the study was a representative sample of the general population, women and men aged 18 years or older. The representative sample design was 1,300 residents throughout Puerto Rico. It was distributed in the 13 police areas and a subsample was created within each police area of gender, age and socioeconomic level (SEL)</p>		
<p><b>Vendor's Involvement:</b></p> <p>As part of the activities carried out to monitor the progress made by the Reform, a research study is carried out on the communities to find out their perceptions of PRPB and public safety in Puerto Rico.</p> <p>The purpose of the research study was to measure the community perception of the PRPB, public safety in Puerto Rico, and the evaluation of compliance with the Reform. This report presents the results of the community study conducted at the request of the United States Monitor's Office and the PRPB.</p>		
<p><b>Project Benefits:</b></p> <p>Identify opportunity areas to improve awareness and perception of the PRPB reform among general population.</p>		
Key Personnel		
Roxana Trabanco	Managing Director	
Esteban Rivera	Senior Research Analyst	

## NEMT- Attachment C

Project Measurements:				
Estimated one-time costs: Confidential information		Actual one-time costs:		
Reason(s) for change in one-time cost:				
Original Value of Vendor's Contract: Confidential information		Actual Total Contract Value:		
Reason(s) for change in value:				
Estimated Start & Completion Dates:	From:	February 3, 2022	To:	March 26, 2022
Actual Start & Completion Dates:	From:	February 3, 2022	To:	March 26, 2022
Reason(s) for difference between Estimated and Actual dates:				
If the vendor performed the work as a Subcontractor, the vendor should describe the scope of subcontracted activities:				

# NEMT- Attachment C

## Subcontractor Reference Form-3

Subcontractor Information		
<b>Vendor Name:</b> <b>IPSOS, INC.</b>	Contact Name:	Roxana Trabanco
	Contact Phone:	1-787-753-8370
Customer Information		
<b>Customer Organization:</b> NORC at the University of Chicago	Contact Name:	Anna Wiencrot
	Contact Title:	Senior Research Director Health Sciences
<b>Customer Address:</b> 55 East Monroe Street, 30th Floor, Chicago IL 60603	Contact Phone:	1-(312) 357-3754
	Contact Email:	Wiencrot-Anna@norc.org
Project Information		
<b>Total Vendor Staff:</b>	60-80 includes fieldwork staff	
<p><b>Project Objectives:</b> Implement a survey of information of national scope aimed at improving the health of all mothers, children, and their families in Puerto Rico.</p> <ul style="list-style-type: none"> <li>• Collect information on factors related to the well-being of children in Puerto Rico.</li> <li>• Explore health status, visits to health care providers, health care costs and health insurance coverage throughout the island.</li> <li>• Identify factors related to the well-being of mothers.</li> <li>• Get to know current health risk behaviors, health conditions, and preventive health practices.</li> <li>• Allow US jurisdictions to better track priorities to improve health of their maternal and children populations.</li> <li>• Allow better annual reporting to the U.S. Congress on the jurisdictions' Title V program accomplishments</li> </ul>		
<p><b>Project Description:</b></p> <p>For the present study, IPSOS will use:</p> <ul style="list-style-type: none"> <li>• Face to face methodology through household interviews</li> </ul> <p>For this survey Ipsos conducted 1,000 valid household interviews in Puerto Rico, but in order to ensure a final sample size of 1,000 valid interviews, Ipsos completed a minimum of 1,050 interviews to account for rejected cases during the final quality control review NORC will conduct prior to finalizing the data file.</p> <p>Household eligibility was defined as a household with at least on child between the ages of 0 and 17 years residing in the household; one child from each household was selected to be the subject of the interview; interviews were conducted with the child's primary caregiver. Respondents were adults, with at least 18 years and older; with no upper age limit.</p> <p>Ipsos supported NORC in generating a representative sample for Puerto Rico. NORC created the sample allocation across Puerto Rico in sample points (census enumeration areas, villages, city districts, neighborhoods, etc.). Ipsos worked with NORC to develop a comprehensive and replicable selection methodology for enumerators to follow in the field.</p> <p>As part of the interview, enumerators/interviewers measured the height and weight of the child who was the subject of the interview (in cases where they were available at the time of the interview) using a basic household scale and simple tools to measure height (enumerators/ interviewers does not need to obtain medical grade measurement equipment).</p> <p>Fieldwork was conducted by interviewers with thorough experience in face to face interviews and public opinion surveys, who will be briefed by senior staff of NORC.</p>		
<p><b>Vendor's Involvement:</b></p> <p>Ipsos was involved in all the fieldwork work of the study, quality control, data cleaning.</p>		

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<b>Project Benefits:</b> Ipsos work provided NORC with the objectives looked for in this study.			
<b>Key Personnel</b>			
Roxana Trabanco		Managing Director	
Begoña Robledo		Service Client Leader	
<b>Project Measurements:</b>			
Estimated one-time costs: Confidential information		Actual one-time costs:	
Reason(s) for change in one-time cost:			
Original Value of Vendor's Contract: Confidential information		Actual Total Contract Value:	
Reason(s) for change in value:			
Estimated Start & Completion Dates:	From:	January, 2023	To: March, 2023
Actual Start & Completion Dates:	From:	January, 2023	To: March, 2023
Reason(s) for difference between Estimated and Actual dates:			
If the vendor performed the work as a Subcontractor, the vendor should describe the scope of subcontracted activities: See product description.			

## Attachment D

Attachment D will be submitted if and when the firm's require an administrative review.





## Attachment E



2024-PRMP-MFP-NEMT-003  
Money Follows the Person NEMT Analysis and Planning Contractor



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

## SLAs, Performance Standards, and Contract Remedies

ID	SLA Subject Areas	Performance Standards	Contract Remedies
1.	<b>Deliverables</b>	Due dates for acceptance of deliverables will be agreed upon by PRMP and the vendor and finalized in the vendor's work plan once formally approved by PRMP. The dates for completion of these deliverables will be used as checkpoints for performance monitoring and vendor payments. The vendor's status reports will provide information on progress toward meeting these deliverable dates.	PRMP shall assess up to \$100 per calendar day per deliverable from the agreed-upon deliverable acceptance date until the date each deliverable receives acceptance from PRMP.
2.	<b>Deliverable Corrections</b>	The vendor shall turn in deliverables within the agreed-upon timeframe. Upon receipt of the vendor's deliverable, the MFP Project Lead reserves the right to review it. The vendor shall address any requested corrections or modifications within one week (calendar days) of receipt of feedback from the MFP Project Lead,	PRMP shall assess up to \$100 per calendar day per deliverable from the agreed-upon deliverable acceptance date until the date each deliverable receives acceptance from PRMP.



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

ID	SLA Subject Areas	Performance Standards	Contract Remedies
3.	<p><b>Turnover</b></p>	<p>unless otherwise specified by the MFP Project Lead.</p> <p>Turnover and Closeout Management Plan defines the vendor's responsibilities related to turnover. Turnover will not be considered complete until the Turnover and Closeout Management Plan and its associated deliverables are accepted by PRMP.</p>	<p>PRMP shall assess up to \$500 per calendar day for each day after the due date that an acceptable Turnover and Closeout Management Plan is not submitted. PRMP shall assess up to \$500 per calendar day for each day after 30 calendar days from the date of the turnover of operations that the Turnover Results Report is not submitted.</p>
4.	<p><b>Turnover Documentation/ Data Handoff</b></p>	<p>The vendor must provide to PRMP or its designee, within seven (7) business days of notice of termination the following information:</p> <ul style="list-style-type: none"> <li>• Copies of all subcontracts and third-party contracts executed in connection with the services included in this contract.</li> <li>• A list of services provided by subcontractors, including the</li> </ul>	<p>PRMP shall assess up to \$500 for each calendar day beyond the seven (7) business days that all required materials are not delivered by the vendor.</p>

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

ID	SLA Subject Areas	Performance Standards	Contract Remedies
5.	<p><b>Email Triage and Acknowledgment</b></p>	<p>names and contact information for the subcontractors.</p> <ul style="list-style-type: none"> <li>Other documentation as defined by PRMP, as evaluation materials, raw data, research information, and others.</li> </ul> <p>The vendor must triage all inquiries received from PRMP. All emails received must be acknowledged within twenty-four (24) hours of receipt and resolved within three (3) business days unless otherwise approved by PRMP.</p> <p>The vendor must forward to the designated PRMP staff within one (1) calendar day those inquiries that are either:</p> <ol style="list-style-type: none"> <li>Determined to be outside the response scope for the vendor.</li> <li>Should be handled by PRMP staff.</li> </ol> <p><b>Compliance and Calculation:</b></p>	<p>\$100 per occurrence of an email not being acknowledged within twenty-four (24) hours.</p> <p>\$100 per occurrence of an email resolution not received within three (3) business days.</p> <p>\$100 per occurrence of any emails forwarded to outside the response scope of the vendor within one (1) calendar day.</p>

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

ID	SLA Subject Areas	Performance Standards	Contract Remedies
6.	<b>Key Staff</b>	<ul style="list-style-type: none"> <li>• Acknowledge all emails received within twenty-four (24) hours and resolve all emails within three (3) business days.</li> <li>• Forward to PRMP staff within one (1) calendar day emails that are determined to be outside of the vendor's response scope.</li> </ul>	Up to a maximum of \$1,000 per occurrence shall be assessed for each key staff person proposed who is changed without proper notice and approved by PRMP for reasons other than legally required leave of absence, sickness, death, or termination of employment.
7.	<b>Key Staff Replacement</b>	The vendor will replace key staff in a timely fashion. Replacement of key staff will take place within thirty (30) calendar days of removal unless a	PRMP shall assess up to \$200 per business day for each business day after the initial thirty (30) calendar days allowed in which an acceptable

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

ID	SLA Subject Areas	Performance Standards	Contract Remedies
8.	<b>Meeting Agendas</b>	<p>longer period is approved by PRMP's authorized representative.</p> <p>The vendor will prepare agendas and distribute each agenda and any documents to be addressed at the meeting at least one (1) Business Days before the meeting, unless waived by PRMP.</p>	<p>replacement for that key staff position is not provided.</p> <p>PRMP shall assess up to \$200 per calendar day for each day an acceptable meeting agenda is not timely received.</p>
9.	<b>Meeting Minutes</b>	<p>The vendor will publish the meeting minutes it attends no later than two (2) Business Days after the meeting, unless waived by PRMP.</p>	<p>PRMP shall assess up to \$200 per calendar day for each day acceptable meeting minutes are not timely received.</p>
10.	<b>Bi-weekly Status Reports</b>	<p>The vendor must provide bi-weekly reports identifying the current status of the activities, including any issues.</p>	<p>PRMP shall assess up to \$200 per calendar day for each day an acceptable bi-weekly report is not timely received. If the report is received on time but the information reported is inaccurate or incomplete, PRMP shall assess up to \$200 per day until an acceptable report is received.</p>

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

ID	SLA Subject Areas	Performance Standards	Contract Remedies
11.	<b>Reporting Timelines</b>	The vendor must comply with the agreed timelines between PRMP and vendor for the various types of reports.	In the event the vendor fails to meet the agreed reporting timelines performance standard, PRMP shall assess up to \$300 per day.
12.	<b>Final Report</b>	The vendor must provide the Final Report in the established date by the MFP Project Lead.	In the event the vendor fails to meet the agreed Final Report, PRMP shall assess up to \$1,000 per day.

\*PRMP reserves the right to modify at its discretion. Any changes will be communicated to all relevant parties in a timely manner.



## Appendices

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### Scope of Work

## 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:

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- 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.

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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"> <li>○ Establish a Project Manager/team for project oversight.</li> <li>○ Provide guidance and feedback during the project.</li> <li>○ Provide requirements, priorities, concerns, relevant data, among others.</li> </ul>

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

### 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.

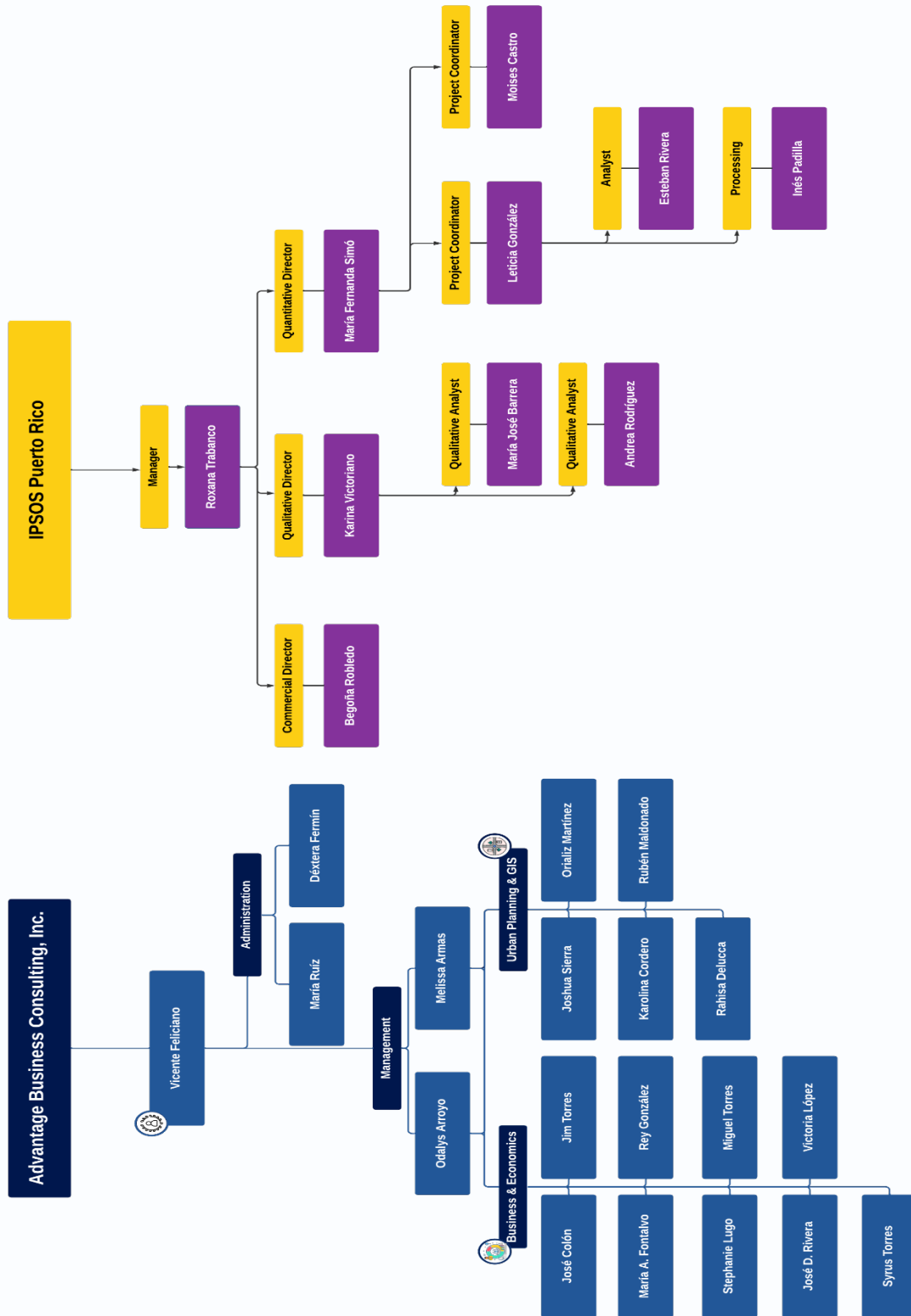
Criteria	Points
<b>Experience:</b> Proposers will be evaluated per their current and past experience and performance with comparable projects.	20
<b>Qualifications of Proposed Personnel:</b> The professional qualifications and accessibility of the firm's professional personnel to be assigned to manage and conduct the analysis.	30
<b>Project approach:</b> 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
<b>Cost:</b> 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
<b>Total Points</b>	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.

✓

# Organizational Chart




## CVs of Key Personnel



Vicente Feliciano

President & Founder

 (787) 751-1818

 chenti@abcpr.net

 <https://www.advantagepr.net/>

## Education

### **MBA**

*IMD Switzerland*

### **BA (Hons) in Economics**

*Harvard University*

## EXPERIENCE

Mr. Vicente Feliciano has more than 30 years of work experience including 15 as a management consultant in engagements requiring expertise in strategic planning and financial management.

Some of the consulting engagements led by Mr. Feliciano are:

- Advised on the business strategy of a financial institution.
- Submitted recommendations regarding the location of a new branch office and the optimization of certain internal processes. Recommendations were accepted because they were feasible to implement given the corporate culture and resources available to the institution.
- Performed an analysis of the fast-food industry for a financial institution. The report showed the trends in Puerto Rico, presented trends in the United States that would probably be replicated on the Island, and projected the performance of the different players.
- Participated in the selection of a turnaround strategy for a hospital. Tasks included assessment of short- and medium-term alternatives, as well as discussions with both management and medical faculty. Recommendations were accepted by the Puerto Rico management and presented to the head office.
- Advised on the reorganization of the marketing and sales efforts of a furniture manufacturing and import/distribution operation. Recommendations provided the corporate structure required to manage growth. They were realistic and considered the personal issues in this family-owned business.
- Performed analysis of the best use of the commercial property for a retailer. The company had two divisions. Advised on which division should operate in the commercial property and the tenant mix that would leverage this retailing business.
- Advised an Internet start-up company on strategy, positioning, and marketing efforts. Prepared business plans and supported negotiations with venture capitalists.

**Odalys arroyo**

Manager - Senior economist

 (787) 751-1818

 odalys@abcpr.net

 <https://www.advantagepr.net/>

## Education

### **MA. Business Management**

*Complutense University of*

*Madrid - Spain*

### **BA. Economics**

*University of Puerto Rico*

*May 2006*

## Experience

Odalys Arroyo, is a seasoned economic consultant with 15 years of experience in the field of business and economics. Her expertise allows her to assist companies in achieving their goals and objectives.

Currently, Mrs. Arroyo serves as the Manager for Advantage Business Consulting located in San Juan, Puerto Rico since 2008. Her duties include providing strategic analysis for both public and private health organizations, assessing short and medium-term alternatives, discussing new trends within the health industry, and conducting valuations.

Mrs. Arroyo has also been heavily involved in numerous projects geared towards meeting Puerto Rico's certification requirements for health facilities. She has worked on a variety of healthcare projects, including acute and intensive care units for hospitals, mental health facilities, radiology centers, and dialysis centers.

Moreover, Mrs. Arroyo has conducted best use and feasibility analysis for various real estate projects, such as shopping centers, condo-hotels, and housing developments. She has also prepared feasibility and strategic studies for cooperatives assessing new locations.

Additionally, Mrs. Arroyo has provided Impact and Economic Loss analysis for individuals involved in litigation related to pregnancy, age, discrimination, and sexual harassment. She has also managed projects, supervised junior staff, analyzed socio-economic impacts, and compiled, analyzed, and reported data to explain the economic and forecast market trends.



**Melissa Armas**

Manager - Senior economist

 (787) 751-1818

 melissa@abcpr.net

 <https://www.advantagepr.net/>

## Education

### **MA. Economics**

*University of Puerto Rico -  
Río Piedras Campus*

May 2021

### **BBA. International Business**

*University of Puerto Rico -  
Humacao Campus*

May 2017

## Experience

Ms. Armas has two and a half years of experience as a business and economic consultant, and has worked on various projects in this field. Her professional engagements include:

Manager, Advantage Business Consulting (June 2021-Present)/  
San Juan, Puerto Rico

- Supervising junior staff in the areas of economics and planning
- Conducting analysis and developing economic impact studies
- Leading research efforts
- Managing the project from start to finish

Junior Consultant, Advantage Business Consulting (June 2021-  
January 2023)/ San Juan, Puerto Rico

- Assisting with research and development of economic and business-related studies
- Preparing datasets and interpreting data

Graduate Research Assistant, University of Puerto Rico Río  
Piedras Campus (August 2019-May 2020)/ San Juan, Puerto Rico

- Gathering and analyzing information regarding accountability measures in Latin America and the UN Global Goals
- Completing administrative duties per professor request

Intern, Puerto Rico Trade and Export Company (June 2017-  
September 2017)/ San Juan, Puerto Rico

- Developing an exporting plan for the architectural firm Escala Corchado Arquitectos
- Performed an extensive market research effort to identify potential exporting markets such as the Dominican Republic, Florida, and Texas.



## Begoña Robledo

Service Line Director and Director of  
Healthcare for CCA (Central America and  
The Caribbean)

 (787) 753-8370

 Begona.Robledo@ipsos.com

 <https://www.ipsos.com/en-pr>

## Education

### **MBA. Graduate School of Business Administration**

*University of Puerto Rico -  
Río Piedras Campus*

1985

### **BBA. School of Public Communications**

*University of Puerto Rico -  
Río Piedras Campus*

1982

## Experience

Ms. Robledo is a Research Coordinator with 7 years of experience. Proficient computer skills: Microsoft Package (Word, Power Point, Excel, Outlook Express). Excellent communication skills in English and Spanish, both written and verbal. Oriented on working with team, organize and multi-tasking.

Service Line Director and Director of Healthcare for CCA (Central America and The Caribbean), IPSOS (2017 - Present) / San Juan, Puerto Rico

- Management and development of marketing Research programs in Puerto Rico, the Caribbean and Latin America for the healthcare market and marketing programs.
- Program coordination and management for multi-country research in Latin America and the Caribbean, including the English-speaking Caribbean.
- Responsible for client relationships, account management, proposal writing and analysis.


Marketing Director, IPSOS (1985 - 2019) / San Juan, Puerto Rico

- Management and analysis of qualitative and quantitative market studies such as: concept and advertising reaction tests, attitude and usage studies, market segmentation, product placement, tracking studies.
- In-depth interviewing and focus groups analyst.



**Roxana Trabanco**

Managing Director

 (787) 753-8370

 roxana.trabanco@ipsos.com

 <https://www.ipsos.com/en-pr>

## Education

### **MA. Marketing and Sales**

*Escuela Europea de Negocios,  
Salamanca, España*

2007

### **BBA. Marketing and Advertising**

Pontifical Catholic University  
of Puerto Rico

2006

## Experience

Ms. Trabanco is Senior Research Specialist with 15 years of experience. Analytical reasoning abilities, intellectual curiosity, strong business acumen, superior organizational skills, meticulous attention to detail, and creativity in problem-solving. Expert knowledge of qualitative and quantitative market research methodologies.

Managing Director, IPSOS (2020 - Present) / San Juan, Puerto Rico

Responsible for the growth and development of the PR Operation.

- Capture and develop new business for clients throughout the Caribbean and Central America region.
- Act as a market research lead and intelligence partner, focused on providing strategic insights, and forming a trusted relationship with clients.
- Collaborate with the analytics team to address burning business questions and provide holistic recommendations to clients.
- Monitor and manage research programs and identify new business opportunities.
- Ensure all activities are conducted in accordance with financial and ethical compliance guidelines.

Account Director / Analyst - Connect Unit, IPSOS (2015 - 2019)/ San Juan, Puerto Rico

- Client service and sales responsibilities with a budget goal.
- Design research programs, including qualitative and quantitative methodologies.
- Monitor every stage of a study, from proposal to final presentation.
- Provide support to regional and global accounts.
- Manage the most important study in the food industry – Radiografía del Consumidor coordinated by MIDA.

Account Director / Analyst - Conect Unit, IPSOS (2015 - 2019)/ San Juan, Puerto Rico

- Client service support responsibilities.
- Coordinate and supervise fieldwork providers.
- Prepare data tables and reports.



## Education

### **MBA. Global Business**

*University of Phoenix*

2012

### **BBA. Business Administration - Economics**

Pontifical Catholic University of Puerto Rico

2002

## Experience

Mr. Rivera is Research Analyst with 19 years of experience. Proficient computer skills, Excellent communication skills in English and Spanish, both written and verbal. Team working oriented and organizational skills, multi-tasking.

Researcher / Analyst, IPSOS (2005 - Present) / San Juan, Puerto Rico

- Design or assist in the development of questionnaires, sampling, and survey data.
- Prepare statistical analysis of internal and external data to identify patterns and make recommendation to companies.
- Collect and interpret statistical data to assist in decision making, including preparation of reports, graphics, and presentations.
- Serve as team resource on analytical methodologies.
- Prepare and present reports and presentations for internal and external users.

Operation Field Assistant, Hispania Research (2002 - 2005) / San Juan, Puerto Rico

- Coordination of field work and focus groups, including field team trainings, status reports and field material preparation.
- Coding and data entry of field data
- Supervision of field teams.

Telephone Center Interviewer, Hispania Research (1992 - 2002) / San Juan, Puerto Rico

- Conduct field interviews from telephone operations center, including consumers and B2B interviews.



## Education

### **MBA. Major in Marketing / Minor in Statistics**

*Metropolitan University (GPA 4.00)*  
2013

### **BBA. Major in Marketing / Minor in Statistics**

*Metropolitan University (GPA 4.00)*  
2010

## Experience

Ms. Padilla is Research with 17 years of experience. Proficient computer skills, Excellent communication skills in English and Spanish, both written and verbal. Team working oriented and organizational skills, multi-tasking. Effective to identify, analytical, receptive to change and focus on problem solving.

Researcher, IPSOS (2007 - Present) / San Juan, Puerto Rico

- Prepare statistical analysis of internal and external data to identify patterns and make recommendation to companies. Including but not limit to regression, correlations, and factor.
- Collect and interpret statistical data to assist in decision making, including preparation of reports, graphics, and presentations.
- Design or assist in the development of questionnaires, sampling, and survey data.
- Prepare reports and presentations for internal and external users.

Field Supervisor, Hispania Research (1987 - 2007) / San Juan, Puerto Rico

- Design or assist in the development of questionnaires.
- Data entry, cleaning and processing data.
- Prepare report findings and illustrate data graphically.
- Develop macros for research reports of tracking studies.
- Field Supervisor in Centro America and Caribbean Island.
- Coordination of field work and focus groups.
- Field Interviewers trainer.
- Field Interviewers supervisor.



## Education

### **BBA. Business Administration, MIS**

University of Puerto Rico -  
Río Piedras Campus  
1983

## Experience

Ms. González is a Research Coordinator with 7 years of experience. Proficient computer skills, Excellent communication skills in English and Spanish, both written and verbal. Team working oriented and organizational skills, multi-tasking. Effective to identify, analytical, receptive to change and focus on problem solving.

Researcher Coordinator, IPSOS (2017 - Present) / San Juan, Puerto Rico

- Project management, and coordination.
- Collect data on consumers, competitors, market and consolidate the information into actionable items, reports, and presentation.
- Responsible for the scheduling, overseeing all project phases, and delegating work to research assistants.

Ops Director, IPSOS (1991 - 2017) / San Juan, Puerto Rico

- Manage the operations of all research projects, quantitative and qualitative methodologies.
- Responsible for the management of all research projects in fieldwork, ensure quality controls, data cleaning and processing.
- Collaborate with statisticians and other professionals.

Data Processor and Scriptor, Hispania Research (1987 - 1991) / San Juan, Puerto Rico

- Script data entry of surveys, run the cleaning of the data, review data processing definition, run crosstabs, and do the quality of the results.





**Evidence of Compliance with all requirements by law to operate in Puerto Rico and contract with Puerto Rico Government.**



**Gobierno de Puerto Rico**  
Administración de Servicios Generales  
Registro Único de Proveedores de

*Servicios Profesionales*

# CERTIFICADO ÚNICO DE PROVEEDORES

**FECHA DE EXPEDICIÓN**

19 de mayo de 2023

**NÚMERO DE CERTIFICACIÓN**

202330431

**FECHA DE VENCIMIENTO**

19 de mayo de 2024

Nombre del Proveedor: Advantage Business Consulting, Inc.

Número de Proveedor: 14918

Unique Entity ID (SAM.gov): CYBTSLJT8M7

Dirección Postal: 1519 Ave Ponce de Leon Suite 1001 FirstBank San Juan, PR 00909

Teléfono: (787) 751-1818

Correo Electrónico: maria@abcpr.net

## PERSONAS AUTORIZADAS A FIRMAR

NOMBRE Y APELLIDOS	TÍTULO QUE OSTENTA
Vicente A. Feliciano Pérez	Presidente
Odalys Arroyo Salgado	Secretaria.

Será responsabilidad de cada Agencia Ejecutiva, Corporación Pública o Municipio validar la elegibilidad del proveedor antes de otorgar cualquier contrato. Así como el de garantizar que el proveedor pueda ofrecer los servicios profesionales conforme a las normas que lo regulan.

**ADVERTENCIA:** Cualquier alteración anula este certificado y podría ser sancionado criminalmente conforme a las disposiciones aplicables del Código Penal de Puerto Rico.



## Entity Workspace Results 1 Total Results

### ADVANTAGE BUSINESS CONSULTING INC

**Unique Entity ID:** CYBTTSLJT8M7

**CAGE/NCAGE:** 5WEM5

**Entity Status:** Active Registration

**Doing Business As:** ADVANTAGE  
BUSINESS CONSULTING

**Physical Address:**  
1519 AVE PONCE DE LEON STE 1001  
SAN JUAN , PR  
00909-1721 USA

**Expiration Date:**  
Feb 06, 2025

**Purpose of Registration:**  
All Awards



**Certificación de Deuda**

Fecha: 19 marzo 2024  
ID de Contribuyente: 05830-53312  
ID de Correspondencia: L1432456896

ADVANTAGE BUSINESS CONSULTING  
FIRST FEDERAL BLDG  
1519 AVE PONCE DE LEON STE 1001  
SAN JUAN PR 00909-1721

Certifico que el contribuyente identificado en la parte superior de este documento no tiene deudas por ningún concepto incluyendo contribución sobre ingresos al día 19 marzo 2024 en nuestro sistema.

**IMPORTANTE:**

**De estar de acuerdo con esta información:** deberá realizar el pago a través de SURI <https://suri.hacienda.pr.gov> a la mayor brevedad posible para así evitar la acumulación de intereses.

**De no estar de acuerdo con esta información:** deberá presentar su reclamación acompañada de la evidencia correspondiente en cualquiera de nuestros Centros de Servicio al Contribuyente (SAC). Para conocer la ubicación de estos centros, puede acceder a [www.hacienda.pr.gov](http://www.hacienda.pr.gov). Sí tiene preguntas relacionadas a este documento, puede comunicarse con nuestro Centro de Llamadas Hacienda Responde al (787) 622-0123.

**Advertencia:** Este documento incluye un detalle de deuda de contribuciones asociadas a su cuenta con balances adeudados, incluyendo intereses, recargos, penalidades, multas y otros, a la fecha de emisión del mismo . Además, esta certificación no incluye deudas pendientes de tasar o en proceso de investigación a la fecha de emisión .

**VALIDACIÓN:**


Para verificar si este Certificado es válido, acceda <https://suri.hacienda.pr.gov> y presione el enlace de "Validar Certificados y Licencias".

**Vigencia: Este Certificado es válido hasta 30 días después de la fecha de emisión.**



**Certificación de Radicación de Planillas**

Fecha: 19 marzo 2024  
ID de Contribuyente: 05830-53312  
ID de Correspondencia: L1572048576

 ADVANTAGE BUSINESS CONSULTING  
FIRST FEDERAL BLDG  
1519 AVE PONCE DE LEON STE 1001  
SAN JUAN PR 00909-1721

**Contribución sobre Ingresos - Entidad Jurídica**

**Año Contributivo Estatus**

2022	Planilla radicada
2021	Planilla radicada
2020	Planilla radicada
2019	Planilla radicada
2018	Planilla radicada

**Advertencia:**

De no estar de acuerdo con esta información, deberá presentar su reclamación acompañada de la evidencia correspondiente en uno de nuestros Centros de Servicio al Contribuyente (SAC). Para conocer la localización de los SAC, puede acceder a [www.hacienda.pr.gov](http://www.hacienda.pr.gov). Si tiene preguntas relacionadas a este documento, puede comunicarse al Centro de Contacto Hacienda Responde al (787) 622-0123.

**VALIDACIÓN**

Para verificar si este Certificado es válido, acceda a <https://suri.hacienda.pr.gov> y presione el enlace de "Validar Certificados y Licencias".



**Certificación de Radicación de Planillas**

Fecha: 19 marzo 2024  
ID de Contribuyente: 05830-53312  
ID de Correspondencia: L1523224256

ADVANTAGE BUSINESS CONSULTING  
FIRST FEDERAL BLDG  
1519 AVE PONCE DE LEON STE 1001  
SAN JUAN PR 00909-1721

Este Comerciante **ha cumplido** con la radicación de sus Planillas Mensuales de Impuesto sobre Ventas y Uso y/o Planilla Mensual de Impuesto sobre Importaciones.

**ADVERTENCIA:**

De no estar de acuerdo con esta información, deberá presentar su reclamación acompañada de la evidencia correspondiente en uno de nuestros Centros de Servicio al Contribuyente (SAC). Para conocer la localización de los SAC, puede acceder a [www.hacienda.pr.gov](http://www.hacienda.pr.gov). Si tiene preguntas relacionadas a este documento, puede comunicarse al Centro de Contacto Hacienda Responde al (787) 622-0123.

**VALIDACIÓN**

Para verificar si este Certificado es válido, acceda <https://suri.hacienda.pr.gov> y presione el enlace de "Validar Certificados y Licencias".

**Vigencia: Este Certificado es válido hasta 30 días después de la fecha de emisión.**

**Government of Puerto Rico  
DEPARTMENT OF THE TREASURY  
Internal Revenue Area**



**Partial Waiver Certificate - Legal Entity**

ADVANTAGE BUSINESS CONSULTING  
FIRST FEDERAL BLDG  
1519 AVE PONCE DE LEON STE 1001  
SAN JUAN PR 00909-1721

Date: dic. 14, 2023  
Taxpayer ID: 05830-53312  
Letter ID: L0576615616  
Control Number: L0576615616

**Partial Waiver Certificate from Withholding at source for Services Rendered  
by Corporations and Partnerships and Other Entities**

In accordance with Section 1062.03(g) of the Puerto Rico Internal Revenue Code of 2011, as amended, and the requirements established in this section, we grant this Partial Waiver Certificate of 4% from Withholding on Payments for Services Rendered in Puerto Rico. Therefore, all payments for services rendered received by a corporation, partnership or entity will be subject to a withholding at source of 6%. This waiver shall be effective for payments made during the calendar year 2024.

A copy of this certificate must be submitted to the person required to make withholding on payments for services rendered.

If the conditions set forth in this certificate do not apply to you, ignore it.

If you have questions regarding the above, you may contact us at (787) 622-0123.

This waiver does not exempt you from any tax liability.

*Hacienda, we are here to help.*

Roxanna Santiago Ortiz  
Assistant Secretary  
Internal Revenue Area

**Valid Until: Dec. 31, 2024**

To verify if this certificate is valid, go to <https://suri.hacienda.pr.gov> and click on the "Validate Certificates and Licenses" link.



## CERTIFICADO DE REGISTRO DE COMERCIANTE

**Nombre Localidad:**

**ADVANTAGE BUSINESS CONSULTING**  
EDIF FIRST BANK 1519 AVE PONCE DE LEON  
STE 1001  
SAN JUAN PR 00909-1721

**Nombre Legal:**

**ADVANTAGE BUSINESS CONSULTING**  
AVE. STE. 1001 EDIF. FIRST BANK 1519 AVE  
PONCE DE LEON  
STE 1001  
SAN JUAN PR 00909-1721

# 0006589-0015

**Agente retenedor**

**Fecha de Emisión:**

01-jun-2022

**Fecha de Expiración:**

31-may-2024

**Tipo de Certificado:** Comerciante

**Código NAICS:**

54161

**Actividad Comercial:**

Servicios de Consultoría en Administración

Certifico que este comerciante está inscrito en el Registro de Comerciantes del Departamento de Hacienda.



**Secretaria Auxiliar  
Área de Rentas Internas**

Este certificado no es transferible y el mismo deberá exhibirse en todo momento en un lugar visible al público en la localidad indicada. Para verificar si este certificado es válido, acceda a <https://suri.hacienda.pr.gov> y presione el enlace "Valide certificados y licencias".



**L0592081472**





## CERTIFICADO DE CUMPLIMIENTO ("GOOD STANDING")

Yo, **Omar J. Marrero Díaz**, Secretario de Estado del Gobierno de Puerto Rico,

**CERTIFICO:** Que, **ADVANTAGE BUSINESS CONSULTING INC.**, registro número **102204**, una corporación **doméstica con fines de lucro** organizada bajo las leyes de Puerto Rico el **17 de junio de 1998**, ha cumplido con la radicación de sus Informes Anuales.



**EN TESTIMONIO DE LO CUAL**, firmo el presente y hago estampar en él el Gran Sello del Gobierno de Puerto Rico, en la ciudad de San Juan, Puerto Rico, hoy, **13 de julio de 2023**.

**Omar J. Marrero Díaz**  
Secretario de Estado

Para validar este certificado acceda a:

<https://estado.pr.gov/>

Este certificado es válido por un (1) año a partir de la fecha de su expedición (Reglamento 8688, Art. 26). Sin embargo, está sujeto al fiel cumplimiento de las disposiciones del Capítulo XV y Capítulo XXI de la Ley 164-2009, según aplique.

Número de Validación del Certificado: **570587-91823135**



## CERTIFICATE OF EXISTENCE

I, **Omar J. Marrero Díaz**, **Secretary of State** of the Government of Puerto Rico,

**CERTIFY:** That according to our records **ADVANTAGE BUSINESS CONSULTING INC.**, with registration number **102204**, is a **domestic for profit corporation** organized on **June 17, 1998**.

*This certification does not certify that this corporation has filed its annual reports, pursuant to the requirements of the General Corporations Law, as amended. If you need to know if such reports have been filed, you must request a Certificate of Good Standing.*



**IN WITNESS WHEREOF**, the undersigned by virtue of the authority vested by law, hereby issues this certificate and affixes the Great Seal of the Government of Puerto Rico, in the City of San Juan, Puerto Rico, today, **July 13, 2023**.

**Omar J. Marrero Díaz**  
Secretary of State

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To validate this certificate go to: <https://estado.pr.gov/>

This certificate can be validated an unlimited number of times before its expiration date of 12-Jul-2024.

Certificate Validation Number: **570613-80715628**

THIS CERTIFIES THAT

## Advantage Business Consulting, Inc.



\* Nationally certified by the: **PUERTO RICO MINORITY SUPPLIER DEVELOPMENT COUNCIL**

\*NAICS Code(s): 541611

\* Description of their product/services as defined by the North American Industry Classification System (NAICS)

10/27/2023

**Issued Date**

PR04290

**Certificate Number**

A handwritten signature in blue ink, appearing to read "Ying McGuire".

**Ying McGuire  
NMSDC CEO and President**

A handwritten signature in blue ink, appearing to read "Francisco S. Cabrera".

**Francisco S. Cabrera**

08/25/2024

**Expiration Date**

By using your password (NMSDC issued only), authorized users may log into NMSDC Central to view the entire profile: <http://nmsdc.org>

[Certify, Develop, Connect, Advocate.](#)

\* MBEs certified by an Affiliate of the National Minority Supplier Development Council, Inc.®