

DEPARTAMENTO DE  
**SALUD**



Puerto Rico Department of Health  
Money Follows the Person  
Long Term Services Support  
Assessment (LTSS)  
Request for Proposal (RFP)

2024-PRMP-MFP-LTSS-002

Date: January 18, 2024

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## Acronyms

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



# 1. RFP QUICK FACTS SHEET

## 1.1 Summary of the RFP

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

PRMP does not currently fund LTSS, either in institutional settings or in home or community-based settings. However, the need in Puerto Rico is very significant. The Money Follows the Person Grant (the Grant) is soliciting assistance from interested entities in the LTSS Assessment process. Some of the goals of the Assessment effort is to inform Puerto Rico and the congressional delegation of the inequities and gaps, and the estimated costs to address the deficiencies, help shape approaches to serving the island’s changing demographic makeup, help ensure equitable access to LTSS and design effective LTSS benefits that allows individual with complex needs to receive services at home or in the community.

Through this invitation, the Program is welcoming interest entities to propose to conduct an LTSS needs assessment.

## 1.2 Period of Performance

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

## 1.3 RFP Process Schedule

RFP Released to Public .....	1/18/2024
Vendor’s Written Questions Submission Deadline .....	1/25/2024: 2:00pm
Questions Responses Posted.....	2/2/2024
Proposal Submission Due Date .....	2/23/2024 2:00pm
Notice of Intent to Award .....	3/19/2024

## 1.4 RFP Communications

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

Elizabeth Otero-Martinez: [elizabeth.otero@salud.pr.gov](mailto:elizabeth.otero@salud.pr.gov)

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

### **1.5 Proposal Submission**

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

**Proposals should be submitted to the address below:**

Puerto Rico Department of Health  
Medicaid Program, ATTN: Elizabeth Otero-Martinez  
268 Luis Muñoz Rivera Ave.  
World Plaza – 12th Floor (Suite 12)  
San Juan, Puerto Rico 00918

## 2. Overview

### 2.1 Background

Money Follows the Person (MFP) is a federally funded Centers for Medicare & Medicaid Services (CMS) demonstration that support states and territories' strategies to rebalance long-term services and supports (LTSS) systems from institutional to home and community-based services (HCBS) settings, while ensuring they have access to necessary non-emergency medical transportation services (NEMT). MFP has played a key role in many states LTSS rebalancing efforts under the Medicaid program providing flexible funding opportunities to help develop and test the necessary processes, tools, and infrastructure to advance LTSS system reform and support successful transition of Medicaid eligible older adults and adults with disabilities from institutional to home and community-based settings.

### 2.2 Purposes

Currently, Puerto Rico does not offer Medicaid funded LTSS. The main purpose of the RFP is to select a vendor with experience conducting community needs assessments to support the grant in the Planning Phase. This assessment is an essential first step that allows Puerto Rico to establish stakeholder partnerships and engage those stakeholders in an assessment effort. The LTSS Needs Assessment will provide the Centers for Medicare and Medicaid Services (CMS) and key stakeholders with an overview of local policy, systems, and environmental change strategies currently in place and help to identify areas of opportunities. With this data collected for the assessment, an operational protocol (OP) will be created to implement MFP in Puerto Rico communities.

The Puerto Rico Assessment will include all populations that may need community based LTSS, such as the elderly (60+) living in the community, elderly in nursing facilities (60+), adults with disabilities (21+), caregivers, and providers (government agencies, non-profit agencies, direct service workers and case workers). Throughout the Assessment, technical assistance (TA), and NEMT activities, Puerto Rico will be identifying opportunities for capacity building. All vendors will be assisting PRMP with capacity building, which will include cost-effective elements that can be implemented with no or limited additional funding.



Once Puerto Rico has the results of the Needs Assessment and the final report, Puerto Rico will be able to demonstrate the service gaps, the needs of Puerto Rico's aged and disabled Medicaid population and the estimated funding needed to implement LTSS. PRMP can also help ensure its eventual LTSS system includes successful models for supplemental services, partnerships with housing agencies, institutional diversion and institutional transition.

## 3. Project Requirements

### 3.1 Scope of Work

PRMP is seeking to contract a vendor with proven expertise conducting community needs assessments. The vendor will support the MFP Project Director and team staff in the LTSS Needs Assessment, within Puerto Rico, which includes the main island's urban and rural locations, and island municipalities of Vieques and Culebra. The purpose of the assessment to seek input regarding the target population's:

- Eligibility levels,
- Services needed,
- Service delivery modes,
- Access Challenges,
- Opportunities,
- Provider capacity,
- Priorities for capacity building.

The Scope of work is expected to include a gap analysis to determine the needs of Puerto Rico LTSS target population. The Assessment contract is expected to include:

1. Reviewing existing data sets including Behavioral Risks Factor Surveillance System (BFRSS) and PRMP internal data to learn more about the target population's health needs in Puerto Rico, sociodemographic profile and census data to compile updated demographic data.
2. Design, develop and distribute one or more surveys as part of the Assessment, compile results and incorporate them into the final LTSS Needs Assessment report.
3. Target population:
  - Older adults (60+): living at home and living in nursing home facilities.
  - People with disabilities (21+).
  - Caregivers.



- Providers: government agencies, non-profits, direct service workers (DSW), and case managers.
4. Collecting Medicaid-funding LTSS utilization from similar states/territories and extrapolating it to Puerto Rico using the population/demographic data collected to estimate the potential utilization of Medicaid-funding LTSS in Puerto Rico.
  5. Surveying individuals currently receiving services in a nursing facility to determine the LTSS needed for them to transition to a home or community-based setting, maintaining a count of individuals who could potentially benefit from MFP.
  6. Helping ensure the Assessment including any surveys or outreach documents, incorporates cultural and family-centric perspectives that are critical to residents of the Commonwealth. This includes incorporating a preference for the face-to-face delivery of services and the essential role of family caregivers.
  7. The vendor will support the MFP Team, **when needed and requested, in consultation with the MFP Project Lead:**
    - Assemble a list of stakeholders for focus meetings and other meetings to inform the Assessment.
    - Interviewing representatives of other government agencies, non-profit/non-government agencies, and emergency medical services.
    - Capturing and compiling input from in person meetings, recording action items from meetings and following up on all items to help ensure a complete Assessment. A summary of all input received will be included as an appendix in the final Assessment report.

A summary of all input received will be included as an appendix in the final Assessment report.

8. Completing a workforce assessment that will include surveying nursing facilities, hospitals, and other health care providers, securing input from stakeholders.
9. Support with:
  - Establishing an MFP advisory Committee, as requested and needed.
  - Assembling a broad list of questions for the focus groups meetings.

- Determining the number of focus groups.
  - Determining the number of attendees per meeting.
  - Determining sample size for surveys.
10. Evaluate Medicaid eligibility groups to determine if there are gaps within the Puerto Rico Medicaid eligibility framework that would be a barrier to Medicaid-funded LTSS.
11. Data Collection: The vendor will design, develop and distribute one or more surveys as part of the Assessment, complete results, and incorporate them into the final Assessment report. The vendor must consider virtual service delivery, including:
- Beneficiary assessment
  - Care management
  - Companion services and respite.

Elicit whether stakeholders only desire these options during times of disaster (pandemic, or natural disasters) or if virtual service delivery should be available at any time.

12. The vendor will evaluate:
- Existing LTSS infrastructure,
  - Infrastructure that would need to be developed for establishing and evaluating level care requirements,
  - Service plan development and oversight,
  - Including consideration of self-directed care.
13. The vendor will evaluate program design and service options used by other Medicaid agencies to identify best practices for person-centered planning, transition services and community integration.
14. Help to ensure all activities support existing efforts regarding the prevention, reporting, and follow-up necessary to identify beneficiary abuse, exploitation, or neglect.
15. The vendor will complete a workforce assessment that will include:
- Nursing facilities
  - Hospitals

- Other healthcare providers

16. Secure input from stakeholders regarding credentials for DSWs, and evaluating options for DSW training, including virtual training and competency-based training.

17. Based on a scan of Quality Measures Sets used by other Medicaid funded LTSS systems and the CMS Meaningful Measures Initiative, provide support with asking stakeholders for input on quality measures, including how the measures should be incorporated into a LTSS system, and how performance on the measures should be evaluated.

18. Capacity Building Activities

Throughout the Assessment, TA, and NEMT activities, Puerto Rico will be identifying opportunities for capacity building. All vendors selected for the MFP Project 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.
- Assisting the MFP Team in the design and implementation plan for services related to LTSS to be included in the project's Operational Protocol (OP). The vendor will work closely with the MFP Project Lead and Advisory Committee experts to ensure that the OP is effective, culturally appropriate/sensitive, and realistic to the challenges and opportunities of implementing LTSS and NEMT ground transportation in Puerto Rico.

The final deliverable of the Assessment vendor will be a detailed report that summarizes information in a format agreed upon during the contract negotiation process. A summary of all input received from focus groups, surveys, interviews and any other data gathering methods. The final report will be delivered within four to six weeks of the end of the 12-month Planning Phase.

**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
  - 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) and target population.

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 target population 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 target group 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 vendor must do a transition of the assessment related information. Involves passing to the MFP Team the evaluation data, results, findings, and raw data, including paper copy surveys in original form. The vendor cannot use the data of the LTSS Assessment for other projects. Software or programs used by the vendor for statistical analysis will not incur additional costs and vendor must provide weekly or monthly real-time data per request.

J. Cultural Competency

The vendor must commit to ensuring a comprehensive and culturally sensitive approach to the island wide LTSS Needs Assessment taking into consideration the diverse cultural landscape, particularly within Puerto Rico and its island municipalities. The vendor must provide a group of evaluators 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 should employ assessment 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 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 baselined upon initial approval of this deliverable by PRDoH. At minimum, the Project Schedule should be updated bi-weekly and delivered to the MFP Project Lead. The format of the reports will be discussed with the winning vendor. Submitted with each Project Schedule should be a document that details the changes made to the Project Schedule since the prior submitted version.
  - The detailed schedule must be approved by the MFP Project Lead.
  - Weekly status reporting to the MFP Project Lead.
- B. Survey administration, execution, and analysis plan
  - Survey methodology and target group numbers.
  - Outreach plan.
  - Bilingual and culturally sensitive 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. LTSS Assessment 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> <li>○ Assist with project tasks as needed/available.</li> </ul>
Vendor	<ul style="list-style-type: none"> <li>○ Assign a Project Manager/Point of Contact to communicate with PRMP.</li> </ul>



Role	Responsibilities
	<ul style="list-style-type: none"> <li>○ Develop relevant project documents such as: proposed methodology, tools, protocols, among others.</li> <li>○ Provide bilingual and culturally competent evaluators to conduct data collection activities, give support with analyses, and 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 that will gather data from target population across all the municipalities, including Vieques and Culebra.
- Submit at least two (2) assessments descriptions where similar services were rendered and included:
  - Developing and implementing a successful 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.
  - **Prior to the vendor submission of its proposal**, the 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.

- Vendors that provide services to PRMP that may represent a conflict of interest may be disqualified. Vendors that provide services that involve overseeing other services may be disqualified.

### **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. Some personnel should be fully bilingual so they can communicate effectively and without delay.

#### **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 vendor 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 vendor 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 eight (8) and nine (9), 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. Proposals from potential evaluators will be assessed based on their demonstrated understanding and incorporation of cultural sensitivity and competency within their approach to conducting the LTSS Needs Assessment. Priority will be given to proposals that showcase a clear strategy for engaging with the diverse cultures and communities within Puerto Rico. Our commitment to cultural competence in the LTSS Needs Assessment is fundamental to achieving accurate and meaningful results that genuinely reflect the needs of the vulnerable populations we aim to serve. Consideration will be given to evidence related to qualifications/experience working with similar projects in Puerto Rico or jurisdictions with similar diversity circumstances.

In addition, vendors must demonstrate in the proposal their capability to accomplish the established deliverables and the final report within the term of twelve months, subject to formalization of an agreement between PRDoH and the selected vendor and the availability of funds.

The vendor must demonstrate that they have the capacity (sufficient number of qualified personnel) to successfully execute the project requirements.

The assigned weight for the criterias above will be 4. For cost, the assigned weight will be 2. The evaluation committee will grant a score from 1 through 5 (1 being the lowest; 5 being the highest) according to their evaluation.

To be evaluated, proposals must be:

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

## 4. Proposal Response Instructions

### 4.1 Proposal Format

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

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

### 4.2 Proposal Style Requirements

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

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

## 5. Administrative and Judicial Review Process

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

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

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

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

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

## 6. Attachment A: Cost Proposal

### Instructions: Attachment A: Cost Proposal

The vendor should include a document titled **Attachment A: Cost Proposal** with a detailed description of estimated expenses.

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

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

## 7. Attachment B: Vendor Reference Form

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

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

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

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

## 8. Attachment C: Subcontractor Reference Form

Subcontractor References (if applicable):

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

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



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

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

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

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

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

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

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