



COMMONWEALTH OF PUERTO RICO

Department of Health
Puerto Rico Medicaid Program

AWARD NOTIFICATION
MONEY FOLLOWS THE PERSON
LONG TERM SERVICES SUPPORT ASSESSMENT
2024-PRMP-MFP-LTSS-002

Pursuant to Executive Order Num. 2021-029¹, Administrative Order Num. OA-581², as amended, Act. No. 38/2017³, as amended, and 45 CFR 74.327-329, the Puerto Rico Medicaid Program (PRMP) issued a Request for Proposal with the purpose of selecting a vendor to conduct a Long-Term Services Support (LTSS) community needs assessment.

In response to the request, PRMP received proposals from three (3) vendors: FTI Consulting, Inc., (FTI), V2A Consulting, LLC, (V2A), and Estudios Técnicos, Inc., (ETI). In accordance with section 3.8 of the RFP, proposals were evaluated by a Puerto Rico Department of Health appointed panel⁴ across four criteria: *Vendor Qualifications, Key Personnel Experience, Project Approach* and *Cost Proposal*, using a weight/score formula.

Based on the committee's determinations and scores given to the proposals, the Evaluation Committee recommended to the PRMP Executive Director that the Buena Pro and subsequent contract be awarded to ETI, whose proposal scored a total of 58 out of a possible 70 points. For their part, V2A scored a total of 43.14 points and FTI a total of 41.66. ETI not only scored the highest points in the technical proposal analysis, but also provided the lowest cost proposal. Having agreed with the committee's recommendation, the Executive Director notifies this Award in favor of Estudios Técnicos, Inc.

Prior to the formation of the contract, ETI must submit all appropriate documentation to the PRMP contract division. Furthermore, it is notified that no service should be provided by ETI until a copy of the contract is filed with the Puerto Rico Office of the Comptroller.

¹ Issued by the Governor of the Commonwealth of Puerto Rico.

² Issued by the Department of Health of Puerto Rico.

³ Known as the Uniform Administrative Procedures Act of the Government of Puerto Rico.

⁴ See administrative Order 2024-586, <https://www.salud.pr.gov/CMS/DOWNLOAD/8503>

PROCEDURAL BACKGROUND

On January 18, 2024, the PRMP published through the program and the Department of Health's websites a request for proposal with the purpose of selecting a vendor who could conduct a community needs assessment for the Long-Term Services Support of the Money Follows the Person grant. According to the RFP vendors had until January 25 to submit questions. 22 questions were received, and responses were posted to the websites.

Three proposals were received by the due date, February 23. The Department of Health's appointed Evaluation Committee commenced the analysis on February 28. Members of the committee evaluated each technical proposal at an individual level, followed by a group session where they discussed individual's scores and reached a group score consensus.⁵ This process repeated itself for each proposal. Once all technical proposals were scored, the cost proposals were evaluated, and their scores added to the technical scores to determine the final value of each.

Oral presentations were not held.

PROPOSAL SUMMARY

FTI Consulting, LLC, is an independent global consulting firm with ample experience in the healthcare field. It has a presence in 31 countries and employs over 8,000 people. For the requested services, FTI proposes a partnership with IMPACTIVO, a Puerto Rico-based consulting firm, and ForHealth Consulting, a unit of the University of Massachusetts T. H. Chan School of Medicine.

According to its proposal, each team member will lead the following workstreams:

- IMPACTIVO – Will lead the stakeholder engagement (information gathering).
- FTI Consulting – Will lead the LTSS utilization and capacity modeling and analytics (relevant information of the Puerto Rico health care ecosystem, healthcare program funding)
- ForHealth – Will lead the LTSS policy, program design and implementation guide (relevant information – United States Medicaid programs and LTSS delivery systems).

⁵ According to Administrative Order 2024-586, three members of the committee constitute quorum. Each proposal was individually, and group scored by a three-member panel.

For information collection, FTI proposes three modalities: Online (Qualtrics platform); in-person interviews with individuals above 60 years old residing in nursing homes or participating day-care programs; and in-person or virtual focus groups and key informant reviews. Inputs from the preceding workstreams will inform downstream work (LTSS assessment report).

- LTSS Needs Assessment and Recommendations with Quality Roadmap
- MFP advisory Committee Presentation

Proposed schedule: 14 months (final report delivery 12 – 14 months).

Cost: \$1,102,900

V2A Consulting, LLC, is a local management consulting firm based in San Juan, with over a decade of experience in the Healthcare and Market & Business Analytics. For this project, V2A proposes partnering with Lateral Strategy, a local market research firm.

According to its proposal, their methodology consists of four phases, each with its own deliverables:

- Work Plan – Includes the development of the initial project schedule plan and a needs assessment strategy. Also, background research, among other related activities. Deliverable: Project Schedule/Management Plan; Research findings; Survey instruments.
- Conduct Assessment – Includes interviews and focus groups; data quality control of results; and develop analysis plan. Deliverable: survey administration; analysis plan.
- Record, Review & Consolidate Data – Record quantitative data; perform statistical analysis; generate Power BI dashboard; extract key findings, insights, and recommendations. Deliverable: Survey response analysis; Results dashboards.
- Findings & Recommendations – Document findings and provide recommendations; outline conclusions and potential “next steps”; and share findings with stakeholders and prepare final report. Deliverable: LTSS Assessment Report.

For information collection, V2A indicated that the survey will be conducted by phone, with an option to complete it in person if sample size (1,117) is not reached by phone.

Proposed schedule: 12 months

Cost: \$785,000

Estudios Técnicos, Inc., is a local private consulting, research, and technical assistance firm established in 1985. Besides its interdisciplinary team of professionals, it has its own fieldwork unit comprised of over 50 surveyors and fieldworkers who are certified for conducting research with human subjects (PHRP – Protecting Human Research Participants). It proposes a partnership with Truenorth, a local firm.

According to its proposal, its methodology incorporates a participatory multi-method research approach, based on the Witkin and Altschuld (2000) model. Tasks will be organized into four main phases, each with its deliverables:

- Plan Needs Assessment (Work plan). Consists of tasks related to the organization and design, to the inventory of service providers and stakeholders, and to the analysis of secondary sources. Deliverables: progress reports.
- Conduct Assessment – Includes: analysis of experience in other jurisdictions, interviews with key informants, and surveys and focus groups. Deliverables: progress reports.
- Record, Review and Consolidate Data – Refers to the processing, quality control of the data generated and the interrelation of findings with the use of INViso application and SPSS. Deliverables: Include descriptive and inferential analysis of the information.
- Findings and Recommendations – The report will emphasize presenting the information for: barriers, challenges, and possible solutions; analysis of current workforce trends as well as future projects; and a synthesis of research and stakeholder outreach. Deliverable: final report.

For information collection, ETI proposes various modalities: interviews with key informants (50 people), survey of the elderly and adults with disabilities (1,600 people/margin of error of +2.8%/95% level of confidence), survey of service providers (sample based on the inventory conducted in Phase 1) and focus groups with caregivers of older adults and people with disabilities (at least 8 focus groups).

Proposed schedule: 12 months.

Cost: \$403,120

PROPOSAL EVALUATION – METHOD AND ANALYSIS

Section 1.5 of the RFP instructed vendors to submit proposals in two distinct parts sealed in separate envelopes: technical proposal and cost proposal. As stated above, prior to the opening of the cost proposals, technical proposals were evaluated by each member of the committee at an individual level, followed by group sessions where members discussed their personal analysis and reached a consensus.

To come up with the points allocated to each category, a **weight/score formula** was implemented. Each item had an assigned weight as stated in the RFP⁶, which had to be multiplied by the consensus score given by the committee to get the final points.

The following table displays each category and its assigned weight:

Table 1

Evaluation Category	Weight	Max Points
Vendor Qualifications <ul style="list-style-type: none"> Evidence related to knowledge in the proposed field. Proposed managerial structure to successfully execute the project requirements. Enough personnel to successfully execute the project requirements. 	4	20
Key Personnel Experience <ul style="list-style-type: none"> Evidence related to qualifications/experience working with similar projects in PR or jurisdictions with similar diversity circumstances. 	4	20
Project Approach		
<ul style="list-style-type: none"> Demonstrated understanding and incorporation of cultural sensitivity and competency within their approach to conducting the LTSS Needs Assessment. 	1	5
<ul style="list-style-type: none"> Showcase a clear strategy for engaging with the diverse cultures and communities within PR. 	1	5
<ul style="list-style-type: none"> Capacity to accomplish the established deliverables and the final report within the term of 12 months. 	1	5
<ul style="list-style-type: none"> Compliance with RFP requirements. 	1	5
Total Points Possible		60

Members were to assign a value from a scale of 1 through 5 to each criterion according to the following rubric:

5: Excellent – exceeds the requirements

⁶ A designated weight of four for each technical category. Project Approach was to be scored according to subdivided criteria.

- 4: Good – fully addresses the requirements
- 3: Acceptable – addresses the requirements, but has some minor deficiencies
- 2: Marginal – Partially addresses the requirements or is very limited
- 1: Unacceptable – Fails to address the requirements

The weights assigned to each category of the technical proposal multiplied by a score of 5 would give 60, the maximum available points for technical proposals. The following table portrays the Evaluation Committee consensus scores for each vendor's *technical* proposal and their respected allotted points:

Table 2

Evaluation Category	Weight	FTI		V2A		ETI	
		Score	Points	Score	Points	Score	Points
Vendor Qualifications	4	3	12	3	12	4	16
Key Personnel Experience	4	3	12	3	12	4	16
Project Approach							
• (same as Table 1)	1	4	4	3	3	4	4
• (same as Table 1)	1	4	4	3	3	4	4
• (same as Table 1)	1	2	2	4	4	4	4
• (same as Table 1)	1	4	4	4	4	4	4
Total Points Possible			38		38		48

After the technical evaluation exercise ended, the committee proceeded to open and add the cost proposal criteria to the equation. The highest possible points, 10, were automatically given to the proposal with the lowest cost. Points provided to the other cost proposals were assigned using the following formula:

$$\frac{\text{lowest cost}}{\text{the vendor's cost being scored}} \times \frac{10}{\text{(the maximum number of cost points available)}} = \text{cost proposal points assigned}$$

According to the vendors cost proposals, points were assigned as follows:

FTI:

$$(\$403,120/1,102,900) \times 10 = 3.66$$

V2A:

$$(\$403,120/\$785,000) \times 10 = 5.14$$

ETI

$$(\$403,120/\$403,120) \times 10 = 10$$

The following table portrays the final overall points given to each proposal:

Table 3

Evaluation Category	Max Points	FTI	V2A	ETI
Technical Proposal	60	38	38	48
Cost Proposal	10	3.66	5.14	10
Total Points	70	41.66	43.14	58

As shown in table 3, ETI ended up with the overall highest points, having ranked first in both technical and cost proposals. According to the analysis, ETI presented the clearest and most complete proposal to fulfill the required task, providing an in-depth description of their methodological approach. The RFP emphasized the need for engagement with the diversity of cultures and communities within Puerto Rico, and to the eyes of the members, ETI provided the most in-tuned approach, adding its ability to provide surveyors and fieldworkers who are PHRP certified. Its proposal described some of its 3,500+ projects, several like the type requested; the theory of Witkin and Altschuld (2000), methodology proposed as ground for the project; and ADA considerations, among other valuable information. Also, its proposed sample size seems to project the most reliable outcome. As if it weren't enough, its cost provided the definitive advantage over its competitors.

FTI presented a solid technical proposal. Their knowledge and experience in healthcare is unquestionable. Undoubtedly, they have the talent and the resources. The committee had some issues, nevertheless. Scores given to its *project approach* category compared to those of ETI except for the "capacity to accomplish the established deliverables and the final report within the term of 12 months". FTI proposes a timeline of 14 months. Although section 1.2 of the RFP indicates that the "term of work is approximately twelve months", other instances of the RFP refer to a period of twelve months. The other two vendors understood the desired target and stood with a 12-months period. To deal with this situation, the committee opted to give a score of 5 to any vendor who could provide the service in less than 12 months; a score of 4 for a 12-months period; a score of 3 for 13 months; a score of 2 for 14 months; and a score of 1 for 15+ months.

Additionally, FTI did not provide a sample size, like its competitors did. Instead, the proposal states: "Utilizing a convenience sampling approach, participants will be recruited in collaboration with local stakeholders, facilitating a wide-ranging and inclusive participant base." Probably, figures regarding this matter would have provided a better perspective of the proposed methodology. Perhaps arguments could be brought against these standpoints, but anyways, FTI's biggest downside is its cost proposal which puts them in far distant consideration.

V2A, for its part, also presented a good technical proposal. Their knowledge acquired through years of work in the local healthcare sector is not in question, but it appears that among the participating vendors V2A is the least experienced in the required field. Its proposed survey would rely heavily on phone calls, a method that members of the committee weren't particularly impressed with. Also, its four phases approach to tackle the solicited task lacked the level of specificity and detailed description that ETI provided with a similar four phases approach. Having such a strong overall proposal in ETI, V2A cost proposal, as in the case of FTI, put vendor outside of genuine competition.

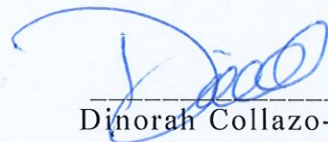
PRMP DETERMINATION

Hereby it is notified that the Puerto Rico Medicaid Program accepts the Evaluation Committee's recommendation to award the Buena Pro and subsequent contract to Estudios Técnicos, Inc. Even though the scores reflect that all three vendors are capable of providing the required service, ETI not only received with the highest score in the technical proposal analysis, but also presented the most advantageous cost proposal. All things considered, PRMP feels confident that this award is being given to a responsible vendor whose proposal is the most advantageous to the program.⁷

As mentioned before, before any services can be provided by the selected vendor, the contract must be filed with the Puerto Rico Office of the Comptroller.

In accordance with section 3.19 of the Puerto Rico Administrative Procedures Act⁸, a copy of this Award Notification will be sent by **EMAIL** to all vendors to the addresses provided.

On March 18, 2024 in San Juan, Puerto Rico.



Dinorah Collazo-Ortiz, ESQ
Executive Director
Puerto Rico Medicaid Program

⁷ See 45 CFR 75.329 (d) (4).

⁸ 3 LPRA §9659.

ADMINISTRATIVE REVISION/JUDICIAL REVIEW – TERMS

Any person or party adversely affected or aggrieved by this award may, according to 3 LPRA §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 consideration. 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 PRDoH may extend said term only once, for an additional period of **fifteen (15) days**.

Any person or party adversely affected by a final reconsideration or decision 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.⁹

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



⁹ See 3 LPRA § 9672.

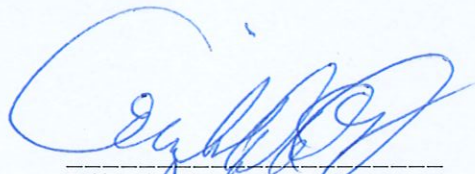
CERTIFICATION

I hereby certify that on March 18, 2024, copy of this award Notification has been sent via email to all vendors to the addresses provided in the submitted proposals:

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