



STATE OF INDIANA
Eric Holcomb, Governor

Department of Administration
Procurement Division
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Award Recommendation Letter

Date: October 28, 2022

To: Erin Kellam, Deputy Commissioner
Indiana Department of Administration

From: Teresa Deaton-Reese, CPPB, CPPO, Procurement Consultant
Indiana Department of Administration

Subject: Recommendation of Selection for RFP 22-71644; Medical Chart Review for the Division of Disability and Rehabilitative Services – Disability Determination Bureau

Estimated Two (2) years contract value: \$2,793,184.00¹

Based on its evaluation of responses to RFP 22-71644, it is the evaluation team's recommendations that all respondents to ensure all the workload/cases are met, be selected to begin contract negotiations to provide Medical Chart Review.

The terms of this recommendation are included in this letter.

The evaluation team received ten (10) proposals from:

- Michael Brill
- Teresa Quant-Callender
- J. Valentine Corcoran
- Joshua Eskonen
- Mangala Hasanadka
- Fernando Montoya
- Steve Roush
- Jonathan Sands
- Shayne Small
- Bruce Whitley

The proposals were evaluated by FSSA and IDOA according to the following criteria established in the RFP:

Criteria	Points
1. Adherence to Mandatory Requirements	Pass/Fail
2. Management Assessment/Quality (Business and Technical Proposal)	45 points

¹ As this figure is based on the number of medical charts that come in for review, the actual amount could be higher or lower.

3. Cost (Cost Proposal)	35 points (+5 bonus pts)
4. Buy Indiana	5 points
5. Minority Business Enterprise Subcontractor Commitment	5 (1 bonus point available)
6. Women Business Enterprise Subcontractor Commitment	5 (1 bonus point available)
7. Indiana Veterans Owned Small Business Subcontractor Commitment	5 (1 bonus point available)
Total: 100 (108 if bonus awarded)	

The proposals were evaluated according to the process outlined in Section 3.2 (“Evaluation Criteria”) of the RFP. Scoring was completed as follows:

A. Adherence to Requirements

Each proposal was reviewed for responsiveness and adherence to mandatory requirements. All responses were deemed responsive and adhered to the mandatory requirements and was moved forward for evaluation.

B. Management Assessment/Quality (45 points)

The Respondents’ proposal was evaluated based on their respective Business Proposal and Technical Proposal.

Business Proposal (5points)

For the Business Proposal evaluation, the evaluation team considered the information the Respondent provided in the Business Proposal. These areas were reviewed to assess the Respondent’s ability to serve the State:

- Company Financial Information
- References
- Experience Serving Similar Clients

Technical Proposal (40 points)

For the Technical Proposal evaluation, the evaluation team considered the Respondent’s proposal in following areas:

- Time Commitment
- In-Office Availability
- Licensure
- Curriculum Vitae (CV)
- Malpractice Suits
- Regulations
- Legal
- Computer Skills
- Experience
- Production and Accuracy Goals
- Transition and Implementation
- Mandated Training
- Training/Consultive Training

Table 1: Management Assessment/Quality Scores – Round 1 – 8-11 Years Experience

Respondent	MAQ Score 45 pts.
Shayne Small	22.75

Table 1: Management Assessment/Quality Scores – Round 1 – 12-15 Years Experience

Respondent	MAQ Score 45 pts.
Teresa Quant-Callender	27.00
Joshua Eskonen	24.00

Table 1: Management Assessment/Quality Scores – Round 1 – 16+ Years Experience

Respondent	MAQ Score 45 pts.
Michael Brill	36.00
J. Valentine Corcoran	22.50
Mangala Hasanadka	24.50
Fernando Montoya	27.75
Steven Roush	26.50
Jonathan Sands	30.50
Bruce Whitley	21.50

C. Cost Proposal (35)

Price

35 available points

Price will be measured against the State’s baseline cost for this scope of work. The cost that the State is currently paying or its best estimate will constitute the baseline cost. Cost scoring points will be assigned as follows:

- Respondents who meet the State’s current baseline cost will receive zero (0) cost points.
- Respondents who propose a decrease to the State’s current costs will receive positive points at the same rate as bid increasing cost.
- Respondents who propose an increase to the State’s current cost will receive negative points at the same rate as bid lowering cost.
- Respondents who propose a 10% decrease to the State’s current baseline cost will receive all the available cost points.

If multiple Respondents decrease costs below 10% of the current baseline, an additional 5 points will be added to the Respondent proposing the lowest cost to the State.

The cost scoring as a result of the Respondents’ cost proposals is as follows:

Table 2: Cost Scores – Round 1 – 8-11 Years of Experience

Respondent	MAQ Score 45 pts.
Shayne Small	.00

Table 2: Cost Scores -Round 1 – 12-15 Years Experience

Respondent	MAQ Score 45 pts.
Teresa Quant-Callender	.00
Joshua Eskonen	.00

Table 2: Cost Scores– Round 1 – 16+ Years Experience

Respondent	MAQ Score 45 pts.
Michael Brill	.00
J. Valentine Corcoran	.00
Mangala Hasanadka	.00
Fernando Montoya	.00
Steven Roush	9.72
Jonathan Sands	.00
Bruce Whitley	.00

D. First Round Total Scores and Shortlisting

The combined Round 1 MAQ and Cost scores from the initial evaluations are listed below.

Table 3: Round 1 – Total Scores

Table 3; Round 1 – Total Scores– 8-11 Years Experience

Respondent	Total Score 80 pts.
Shayne Small	22.75

Table 3: Total Score– Round 1 – 12-15 Years Experience

Respondent	Total Score 80 pts.
Teresa Quant-Callender	27.00
Joshua Eskonen	24.00

Table 3: Total Score– Round 1 – 16+ Years Experience

Respondent	Total Score 80 pts.
Michael Brill	36.00
J. Valentine Corcoran	22.50
Mangala Hasanadka	24.50
Fernando Montoya	27.75
Steven Roush	36.22
Jonathan Sands	30.50
Bruce Whitley	21.50

All respondents were asked for a best and final offer, (BAFO).

E. IDOA Scoring

IDOA scored the Respondents in the following areas: Buy Indiana (5 points) MBE Subcontractor Commitment (5 points + 1 available bonus point), WBE Subcontractor Commitment (5 points + 1 available bonus point), and Indiana Veterans Owned Small Business (5 points + 1 available bonus point) using the criteria outlined in the RFP. When necessary, IDOA clarified certain M/WBE and IVOSB information with the Respondents. Once the final M/WBE forms were received from the Respondents, the total scores out of 108 possible points were tabulated and are as follows:

Table 4: Final Evaluation Scores – 8-11 Years of Experience

Respondent	MAQ Score	Cost Score	Buy Indiana	MBE	WBE	IVOSB	Total Score
Points Possible	45	35(+ 5 bonus pts)	5	5 (+1 bonus pt.)	5 (+1 bonus pt.)	5 (+1 bonus pt.)	100(+8bonus pts.)
Shayne Small	22.75	.00	.00	-1.00	-1.00	-1.00	19.75

Table 4: Final Evaluation Scores – 12-15 Years of Experience

Respondent	MAQ Score	Cost Score	Buy Indiana	MBE	WBE	IVOSB	Total Score
Points Possible	45	35(+ 5 bonus pts)	5	5 (+1 bonus pt.)	5 (+1 bonus pt.)	5 (+1 bonus pt.)	100(+8bonus pts.)
Teresa Quant-Callender	27.00	.00	.00	-1.00	-1.00	-1.00	24.00
Joshua Eskonen	24.00	.00	5.00	-1.00	-1.00	-1.00	26.00

Table 4: Final Evaluation Scores – 16+ Years of Experience

Respondent	MAQ Score	Cost Score	Buy Indiana	MBE	WBE	IVOSB	Total Score
Points Possible	45	35(+ 5 bonus pts)	5	5 (+1 bonus pt.)	5 (+1 bonus pt.)	5 (+1 bonus pt.)	100(+8bonus pts.)
Michael Brill	36.00	.00	.00	-1.00	-1.00	-1.00	33.00
J. Valentine Corcoran	22.50	.00	.00	-1.00	-1.00	-1.00	19.50
Mangala Hasanadka	24.50	.00	5.00	-1.00	-1.00	-1.00	26.50
Fernando Montoya	27.75	.00	5.00	-1.00	-1.00	-1.00	29.75
Steven Roush	26.50	14.58	.00	-1.00	-1.00	-1.00	38.08
Jonathan Sands	30.50	.00	.00	-1.00	-1.00	-1.00	27.50
Bruce Whitley	21.50	.00	.00	-1.00	-1.00	-1.00	18.50

Award Summary

During the course of evaluation, the State scrutinized all proposals to determine the viability of the proposal to meet the goals of the program and the needs of the State. The team evaluated proposals based on the stipulated criteria outlined in the RFP document.

The term of the contract shall be for a period of two (2) years from the date of contract execution. There may be one (1) two-year renewal for a total of four (4) years at the State’s option.