



STATE OF INDIANA

Eric Holcomb, Governor

Department of Administration
Procurement Division

402 W Washington Street, Room W468
Indianapolis, Indiana 46204

Award Recommendation Letter

Date: October 4, 2023

To: L. Erin Kellam, Deputy Commissioner,
Indiana Department of Administration

From: Teresa Deaton-Reese, Senior Account Manager,
Indiana Department of Administration

Subject: Recommendation of Selection for RFP 23-75072: Indiana PathWays for Aging Member Support Services

Based on its evaluation of responses to RFP 23-75072, it is the evaluation team's recommendation that **Indiana Legal Services, Inc.** and **Maximus US Services, Inc.** be selected to begin contract negotiations to provide Indiana PathWays for Aging Member Support Services (MSS) for the Family and Social Services Administration (FSSA).

Indiana Legal Services, Inc. has not committed to subcontract any portion of the contract value to other vendors.

*Maximus US Services, Inc. has committed to subcontract 8.14% of the contract value to **The Panther Group, Inc.**, a certified Minority-owned Business (MBE), 10.97% of the contract value to **Guidesoft, Inc dba Knowledge Services**, a certified Women-owned Business (WBE), 0.07% of the contract value to **Miles Printing Corporation**, a certified Women-owned Business (WBE), and 3.21% of the contract value to **BTO IX, Inc. dba Express Employment Professionals**, a certified Indiana Veteran-Owned Small Business (IVOSB).*

The terms of this recommendation are included in this letter.

Estimated four (4) year Contract Values:

- ILS: \$5,082,614.92
- Maximus: \$7,524,166.48

The evaluation team received two (2) proposals from:

1. Indiana Legal Services, Inc. (ILS)
2. Maximus US Services, Inc. (Maximus)

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
3. Cost (Cost Proposal)	35
4. Buy Indiana	5
5. Minority Business Enterprise Subcontractor Commitment	5 (1 bonus pt. available)
6. Women Business Enterprise Subcontractor Commitment	5 (1 bonus pt. available)
7. Indiana Veteran-Owned Small Business Subcontractor Commitment	5 (1 bonus pt. available)
Total: 100 (103 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 of the Respondents were deemed responsive, as they met the mandatory requirements listed in the RFP.

B. Management Assessment/Quality: Initial Scoring (45 Points)

The two (2) responsive Respondents’ proposals were each evaluated based on their respective Business and Technical Proposals.

These areas were reviewed to assess the Respondent’s ability to serve the State:

- Company Information
- References
- Executive Summary and General Responsibilities
- Access Point for MCE Education and Member Issues + Case Scenario #1
- Grievances and Appeals + Case Scenario #2
- Communications and Helpline, Coordination with other Contractors
- Technology Requirements and Disaster Recovery
- Conflict of Interest, Staffing, Incoming and Outgoing Transition Activities, and Subcontracting
- Monitoring and Reporting Requirements
- Health Equity and Cultural Competency, Quality Assurance
- Invoicing and Payments, Key Performance Measures and Contractor Performance

The evaluation team’s Round 1 scoring is based on a review of the Respondent’s proposed approach to each section of the Business Proposal and Technical Proposal. The initial results of the Management Assessment/Quality Evaluation are shown below:

Table 1: Management Assessment/Quality Scores - Round 1

Respondent	MAQ Score 45 pts.
ILS	29.50
Maximus	33.75

C. Cost Proposal (35)

Price points were awarded on the Respondents' Costs as follows:

Score =

- If Respondent's Cost amount is lowest among all Respondents, then score is 35.
- If Respondent's Cost amount is NOT lowest among all Respondents, then score is:

$$35 * \frac{(\text{Lowest Respondent's Cost Amount})}{(\text{Respondent's Cost Amount})}$$

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

Table 2: Cost Scores - Round 1

Respondent	Cost Score 35 pts.
ILS	35.00
Maximus	22.99

D. First Round Total Scores

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

Table 3: Total Scores - Round 1

Respondent	Total Score 80 pts.
ILS	64.50
Maximus	56.74

With IDOA approval, the evaluation team elected to move to the next evaluation stage with both Respondents based on Round 1 Total Scores. The evaluation team elected to invite the two (2) Respondents to give oral presentations. Additionally, the evaluation team issued clarification questions and a request for Best and Final Offers (BAFOs) to both Respondents.

E. Post Clarifications, Oral Presentations and BAFO Evaluations

The Respondents' cost scores were updated based on their BAFOs. The Respondents' MAQ scores were reviewed based on the responses to the clarification questions and the oral presentations. The scores for the Respondents after the clarification questions, oral presentations and BAFOs were as follows:

Table 4: Post-Oral Presentations and BAFOs - Evaluation Scores - Round 2

Respondent	MAQ Score (45)	Cost Score (35)	Total Score (80)
ILS	34.50	35.00	69.50
Maximus	33.75	23.64	57.39

F. IDOA Scoring

IDOA scored the Respondent in the following areas: MBE Subcontractor Commitment (5 points + 1 available bonus point), WBE Subcontractor Commitment (5 points + 1 available bonus point), IVOSB Subcontractor Commitment (5 points + 1 available bonus point), and Buy Indiana Commitment (5 points) using the criteria outlined in the RFP. When necessary, IDOA clarified certain MBE/WBE/IVOSB information with Respondents. Once the final MBE/WBE/IVOSB forms were received from the Respondents, the total scores out of 103 possible points were tabulated and are as follows:

Table 5: Final Evaluation Scores

Respondent	MAQ Score	Cost Score	MBE*	WBE*	IVOSB*	Buy Indiana	Total Score
Points Possible	45	35	5 (+1 bonus pt.)	5 (+1 bonus pt.)	5 (+1 bonus pt.)	5	100 (+3 bonus pts.)
ILS	34.50	35.00	-1	-1	-1	5	71.50
Maximus	33.75	23.64	5	5	6	0	73.39

* See Sections 3.2.5, 3.2.6, and 3.2.7 of the RFP for information on available MBE/WBE/IVOSB bonus points.

Award Summary

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

The term of the contracts shall be for a period of four (4) years. There may be two (2) one-year renewals for a total of six (6) years at the State's option.