Education Mercedes Toural, Associate Superintendent

SUBJECT:

REQUEST FOR AUTHORIZATION FOR THE SUPERINTENDENT TO ISSUE A REQUEST FOR PROPOSALS FROM AGENCIES TO PROVIDE COST RECOVERY MEDICAID FEE-FOR-SERVICE, EFFECTIVE JULY 1, 2003 THROUGH JUNE 30, 2004

COMMITTEE:

ELEMENTARY AND SECONDARY EDUCATION AND SCHOOL OPERATIONS

Authorization is requested to issue a Request for Proposals (RFP) from agencies to provide cost recovery Medicaid Fee-For-Service. The Fee-For-Service Program currently reimburses the District for the following services to Individuals with Disabilities Education Act (IDEA) eligible students: speech therapy, physical therapy, occupational therapy, behavioral services, augmentative and/or communication services, nursing services, and transportation. The District seeks to continue obtaining reimbursement for these services and to obtain reimbursement for any other eligible services under the Florida Certified School Match Program.

The Florida Medicaid School Match Program reimburses school districts for services provided to Medicaid eligible students who are eligible for services under IDEA, Part B or C. Since 1998, the District has implemented procedures to obtain reimbursement through this program. The District received \$1,375,205 in cost recovery for the 2001-2002 fiscal year and paid \$300,000 in fees to Deloitte Consulting, L.P.

The purpose of this RFP is to establish a contract for services from July 1, 2003 through June 30, 2004. Approval will be requested to renew the contract for a maximum of two additional one-year periods, if the terms of the contract have been satisfactorily completed.

The selection of the cost recovery agent will be made by a committee on the basis of several factors including qualifications, ability to provide bilingual services, and fee. The proposed members of the selection committee are:

- the Assistant Superintendent of Curriculum Support & Innovative Programs or designee;
- the Assistant Superintendent of the Office of Exceptional Student Education and Student/Career Services;
- the Risk and Benefits Officer of the Office of Risk and Benefits Management or designee;

- a region director for Exceptional Student Education;
- a representative from the Division of Business Development and Assistance;
- a representative from the Department of Transportation;
- a representative from the Bureau of Procurement and Materials Management;
- a representative from the Office of Budget Management;
- a representative from the Office of Information Technology;
- a representative from School Operations; and
- a representative from the United Teachers of Dade.

The estimated timeline for implementation is as follows:

Procurement Contract Review Committee	February 6, 2003
Request Board approval to issue RFP and approval of a Selection Committee	February 12, 2003
Mailing of RFP	February 18, 2003
Opening of Proposals	March 25, 2003
Evaluations completed by Selection Committee	April 14, 2003
Contract Award	May 14, 2003
The engraprication for this item will be included in the 2004	0.0004.T. I.I. B. I

The appropriation for this item will be included in the 2003-2004 Tentative Budget to be recommended for adoption in July 2003 under Fund 0100, Function 5217, Program 6845, Object 5310, Location 9731.

**RECOMMENDED**: That The School Board of Miami-Dade County, Florida:

- 1. authorize the Superintendent to issue a Request for Proposals from agencies to provide cost recovery Medicaid Fee-For-Service, from July 1, 2003 through June 30, 2004; and
- 2. approve the selection committee to evaluate proposals submitted.

The appropriation for this item will be included in the 2003-2004 Tentative Budget to be recommended for adoption in July 2003.

RKF:ccb

#### REQUEST FOR PROPOSALS #092-CC10

### REQUEST FOR PROPOSAL FOR COST RECOVERY AGENT MEDICAID FEE-FOR-SERVICE PROGRAM

# THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA PROPOSAL RETURN DATE March 25, 2003

RFP #092-CC10

## REQUEST FOR PROPOSALS #092-CC10 REQUEST FOR PROPOSAL FOR COST RECOVERY AGENT MEDICAID FEE-FOR-SERVICE PROGRAM

#### THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA

#### I. NAME AND ADDRESS OF REQUESTOR

Miami-Dade County Public Schools
Office of Exceptional Student Education and Student/Career Services
1500 Biscayne Boulevard, Suite 407
Miami, Florida 33132

#### II. PURPOSE OF REQUEST FOR PROPOSALS

The School Board of Miami-Dade County, Florida, hereinafter referred to as "School Board", is seeking to engage a cost recovery agent, hereinafter referred to as the "agent" with expertise in the Florida Certified School Match Program, who will implement procedures for obtaining reimbursement for services provided to Medicaid eligible students who are also eligible under the Individuals with Disabilities Education Act (IDEA).

#### III. INSTRUCTIONS FOR SUBMISSION OF PROPOSALS

Nine copies of this proposal, one of which must be an original, must be received by 2:00 p.m.(Eastern Standard Time) March 25, 2003, at:

The School Board of Miami-Dade County, Florida Bid Clerk, Division of Procurement Management 1450 NE Second Avenue, Room #352 Miami, Florida 33132

The proposal must be submitted in a sealed envelope or box marked "PROPOSAL FOR COST RECOVERY AGENT MEDICAID FEE-FOR-SERVICE PROGRAM".

It is anticipated that a proposal(s) may be presented to the School Board for acceptance on or about May 14, 2003. If accepted, notification to the successful proposer(s) will be on or after May 15, 2003. The School Board reserves the right to reject any and all proposals.

#### IV. DESCRIPTION OF THE PROGRAM AND SCOPE OF SERVICES

Miami-Dade County Public Schools (M-DCPS) has a student enrollment of more than 370,000 students with approximately 11% of the total student population (41,000) identified as disabled. The 1997 Florida Legislature revised state statutes to authorize the Florida Medicaid program to develop a new School Match Program category of services termed "school-based services" and to seek federal approval to reimburse school districts for services provided to Medicaid eligible students that are eligible for services under the Individuals with Disabilities Education Act (IDEA), Part B or C. Since that time, the District has developed and implemented procedures to obtain reimbursement through this program.

The Fee-For-Service program currently reimburses the district for the following services to IDEA eligible students: speech therapy, physical therapy, occupational therapy, behavioral services, nursing services, augmentative and alternative communication devices, and transportation. The District seeks to continue obtaining reimbursement for these services and to obtain reimbursement for any other eligible services under the Florida Certified School Match Program.

The scope of services includes, but is not limited to, the following:

- A. the maintenance and refinement of procedures to determine, identify and verify Medicaid eligibility of students, to review records, provide claim documentation, submission, and monitoring;
- B. the maintenance of an electronic tracking system to monitor students receiving therapy or services and payments billed and received;
- C. the training of staff and eligible providers, including contracted providers, which includes, but is not limited to, formal and informal presentations and provision of written or electronic materials (e.g., procedures manuals and computer aided instruction);
- D. the processing of Fee-For-Service claims, which includes, but is not limited to, claim calculations, claim documentation, submission and resolution;
- E. assistance with audits and/or reviews that may be conducted by local, state or federal agencies responsible for the Medicaid program;
- F. the periodic submission of reports to the School Board detailing types of reimbursable therapies and services, number of School Board service providers, and number of reimbursable claims;

- G. the monitoring and assessing of the School Board's Fee-For-Service program, ensuring maximum reimbursement within state and federal auditing guidelines;
- H. the assistance in negotiations with state and federal Medicaid agencies relating to reimbursable services, credentialing, and access to Medicaid eligibility information and data transfer;
- developing and providing training for School Board administrators regarding the overview and benefits of School Board's Fee-For-Service program;
- J. developing and providing training for School Board provider groups, to include the overview, benefits, specific procedures, and documentation required to implement the Fee-For-Service program; and
- K. tracking of licensure of all providers associated with programs to determine which providers meet eligibility requirements to claim reimbursement.

#### V. REQUIRED INFORMATION TO BE SUBMITTED BY PROPOSERS

Proposers must possess the following minimum qualifications to be considered for the provision of the above-referenced services and submit the information listed below:

- A. Curriculum Vitae or Resume. Submit curriculum vitae or resume specifically addressing the proposer's experience in the area of Medicaid reimbursement, particularly in the area of claims for school-based services. Proposer must have a minimum of three years experience with Medicaid cost recovery and provide evidence of at least one successful project implementation with a school district of more than 75,000 students.
- B. **Authorized Representative for the Agency.** If proposer is an agency, give the name(s) of the person(s) who will be authorized to make presentations for the agency, his/her title(s), address(es), telephone number(s), and copy(ies) of his/her vitae/resume.
- C. **Description of Services.** Proposer is to describe, point by point, the methods utilized to accomplish the scope of services described within Section IV, DESCRIPTION AND SCOPE OF SERVICES.

- D. Assistance during Initial Design and Implementation. Each proposer shall be required to indicate that he/she is are willing to provide a full time staff member to assist in the design and implementation of the Medicaid Fee for Service Program.
- E. Location and Administrative Organization of Agency. Give the location of the proposer's office, and if an agency, provide the number of partners, managers, supervisors, and other professional staff.
- F. Record of awarded projects. Submit a list of projects that this proposer/agency has undertaken and the status of the projects.
- G. Quality of Prior Work (Technical and Written). Submit an example of previous work. List experience in Medicaid billing for school-based services.
- H. **References.** Provide the names of three major institutions that have contracted with the proposer for professional services and/or employers for which the proposer has performed said services as part of his/her job description. Please include name of contact person, title of contact person, institution, and telephone number.
- I. Costs for Services. Proposer must disclose how payments will be assessed for services rendered. Indicate specific information including additional information the proposer thinks is related to cost.
- J. Financial Statements. Each proposer shall submit both a current financial statement and a financial statement for the immediately preceding fiscal year. The statements shall be certified by an independent Certified Public Accountant and prepared in accordance with United States Generally Accepted Accounting Principles, including the basic financial statements and the required disclosures. For the purposes of this provision, a current financial statement shall be the most recent fiscal year-ending statement. Financial statements dated more than six months prior to the commencement of services for the School Board must be accompanied by (1) a certification by an owner, partner, or corporate officer that there has been no material adverse change since the date of the fiscal year-ending statement and (2) an interim financial statement less than six months old.

#### VI. TERMS OF CONTRACT

The purpose of this Request for Proposals (RFP) is to establish a contract for services from July 1, 2003 through June 30, 2004. The contract may, by mutual agreement between the School Board and the awardee upon final School Board approval, be renewable for a maximum of two additional one-year periods. The School Board, through the Bureau of Procurement and Materials Management, shall, if considering to renew, request a letter of intent to renew from the awardee

prior to the end of the current contract period. The awardee will be notified when the recommendation has been acted upon by the School Board.

The School Board, by law, must reserve the right to cancel the contract at the end of the year of the contract term or fiscal year, as well as in the event the services rendered do not comply with the provisions of the proposal and/or the quality of service is found to be undesirable.

If selected, the proposer shall agree to hold harmless, indemnify and defend the indemnitees (as hereinafter defined) against any claim, action, loss, damage, injury, liability, cost or expense of whatsoever kind or nature including, but not by way of limitation, attorneys' fees and court costs arising out of bodily injury or damage to tangible property arising out of or incidental to the performance of the services of this RFP by or on behalf of the proposer, excluding only the sole negligence or culpability of the indemnitee. The following shall be deemed to be indemnitees: The School Board of Miami-Dade County, Florida, and its members, officers and employees.

#### VII. EVALUATION OF PROPOSALS

Proposals will be evaluated by representatives of the District in order to ascertain which proposal best meets the needs of the School Board. The evaluation process will include, but not be limited to, the following:

- A. emphasis on the background, qualifications, experience and/or expertise in the area of Medicaid reimbursement for school-based services;
- B. at least three years of documented experience in preparing and submitting claims for Medicaid reimbursement for school-based services and at least one successful project implementation with a school district of more than 75,000 students;
- C. efficiency of method proposed to accomplish the scope of services described within Section IV, DESCRIPTION OF AND SCOPE OF SERVICES;
- D. responsiveness of the proposal in clearly stating an understanding of the work to be performed and the ability to perform the service;
- E. ability to perform the service in the most effective way;
- F. ability to establish administrative procedures and other pertinent components of a package for Medicaid reimbursable services;
- G. Minority/Women Business Enterprise (M/WBE) participation;
- H. Affirmative Action Employment Breakdown; and

#### I. completeness of proposal.

The School Board reserves the right to reject any and all proposals submitted, or any phase thereof. The School Board retains the right to waive irregularities in proposals that are submitted. When the final selection is made, professional services agreements acceptable to the School Board Attorney may be entered into with the successful proposer. No debriefing or discussion will be held with unsuccessful firms. The information contained in this proposal is supplied as an aid to the proposer in determining whether it will be able to supply the services which may be required by the School Board.

A selection committee will review all proposals received and may interview a short list of proposers. Any firm not present for the interview session, if held, will be automatically disqualified.

The selection committee will consist of the following members:

- the Assistant Superintendent of Curriculum Support & Innovation Programs or designee;
- the Assistant Superintendent of the Office of Exceptional Student Education and Student/Career Services;
- the Risk and Benefits Officer of the Office of Risk and Benefits Management or designee;
- a region director of Exceptional Student Education;
- a representative from the Division of Business Development and Assistance;
- a representative from the Department of Transportation;
- a representative from the Bureau of Procurement and Materials Management;
- a representative from the Office of Budget Management;
- a representative from the Office of Information Technology;
- a representative from School Operations; and
- a representative from the United Teachers of Dade.

If, due to illness or other unforeseen circumstances, any member of the selection committee is unable to participate, the Assistant Superintendent, Exceptional Student Education and Student/Career Services, shall appoint a replacement. If a replacement is needed, all efforts will be made to assure that ethnic and gender representation is maintained.

#### VIII. AFFIRMATIVE ACTION REQUIREMENTS AND M/WBE PARTICIPATION

#### A. Equal Employment Opportunity

It is the policy of the School Board that no person will be denied access,

employment, training, or promotion on the basis of gender, race, color, religion, ethnic or national origin, political beliefs, marital status, age, sexual orientation, social and family background, linguistic preference, or disability, and that merit principles will be followed. Each proposer is required to indicate its equal employment policy and provide a detailed breakdown by ethnicity, gender, and occupational categories of its work force. See Attachment A - Affirmative Action Employment Breakdown.

B. Minority/Women Business Enterprises (M/WBE) Participation

The School Board has an active Minority/Women Business Enterprises (M/WBE) Program to increase contracting opportunities for M/WBEs. In keeping with this policy, if a minority firm, which is woman, or African American-owned and operated, is to perform a scope of work, provide documentation to substantiate the M/WBE and its staff's experience in providing this type of service. All M/WBEs must be certified by the Division of Business Development and Assistance prior to contract award. See Attachment B - M/WBE Certification Application.

C. Quarterly reports documenting efforts undertaken by the proposer to maintain the stipulated M/WBE participation will be required. The reports shall include the names of firms, contact persons and expenditures paid each quarter, and shall be submitted to the Director, Division of Business Development and Assistance, 1450 N.E. 2nd Avenue, Room 456, Miami, Florida 33132.

#### IX. IMPLEMENTATION SCHEDULE

The planned schedule for implementation of proposals for the provision of Medicaid Fee-For-Service reimbursement, is as follows:

Procurement Contract Review Committee	February 6, 2003
Request School Board approval to issue RFP and approval of Selection Committee	February 12, 2003
Mailing of RFP	February 18, 2003
Opening of Proposals	March 25, 2003
Evaluation completed by Selection Committee	April 14, 2003
Contract Award	May 14, 2003

#### X. ADDITIONAL INFORMATION

Any additional information with respect to the Request for Proposals may be obtained from:

Ms. Barbara Jones, Supervisor
Bureau of Procurement and Materials Management
Miami-Dade County Public Schools
1450 NE Second Avenue, Room 356
Miami, Florida 33132
Telephone: 305 995-2348

Any additional information regarding proposal specifications may be obtained from:

Mr. Ronald K. Felton, Assistant Superintendent
Office of Exceptional Student Education & Student/Career Services
Miami-Dade County Public Schools
1500 Biscayne Boulevard, Suite 407
Miami, Florida 33132
Telephone: 305 995-1721

# **ATTACHMENT A**

# AFFIRMATIVE ACTION EMPLOYMENT BREAKDOWN

					Race/Ancestry		
Occupational Category	Male G	Gender	Non- Hispanic	Non- Hispanic			Am. Ind./
_			Wille	Black	Hispanic	Asian	Native
							i.
					-		
					¥		



#### ATTACHMENT B



For office use only:	
Date received: Reviewer:	_
M/WBE Code: Date Approved:	-
Vendor #:	_

### M/WBE CERTIFICATION APPLICATION

_	(Please Print/Type)				
	Certification Category Requ	uested: ( ) African ( ) Hispani	American c	( ) Woman	า
-	Business Name				
	business Name			President's/O	Wner's Name
	( )				The state of the s
	Telephone number	Fax num	ıber		E-Mail Address
	Business street address				
_	Business mailing address				
		k one and indicate the	date the I	ousiness was e	stablish od)
	Business mailing address  LEGAL STRUCTURE: (Chec	k one and indicate the	date the I		stablished)
	LEGAL STRUCTURE: (Chec	k one and indicate the Date	date the l	ousiness was es	
	LEGAL STRUCTURE: (Chec		date the f	Joint Venture	stablished) Date
	LEGAL STRUCTURE: (Chec ( ) Sole proprietor ( ) Partnership		date the ! ( )	Joint Venture  Corporation	Date
	LEGAL STRUCTURE: (Chec	Date	date the ! ( )	Joint Venture	

management <u>certification re</u>	DNS: Indicate if to personnel with and evoked as an MBE/D authority, as	his business s other business BE/WBE or SBA	hares com that has 8(a) Certi	mon officer received, fied Contra	ers, owners been denie	d, directors o
(certification/c	ig authority, as lenial/revocation).	well as	the date	and	type of	determinatio
Agency Name		<u>Det</u>	ermination			<u>Date</u>
4. OWNERSHIP:						
a. Identify the or (r) reside	proprietor, each par ency status, gender, o	tner, or stockho ethnic group, ar	older by na nd percenta	me, as we ige of own	ll as his/her d ership.	citizenship (c
Name	Owner/ shareholder	Resident or *U.S. Citizen	Gender	Ethnicity	% ' Owned	Years Owned
b. If the busine	ss is a corporation, p	please indicate t	he followir			
1. The num	ber of shares authori	zed:	710 101104411	ıg.		
2. The num	ber shares issued:					
3. Are there	any stock option ag ease provide a copy	<b></b>	No ent.			
OPERATIONAL O	CONTROL: Provide to and non-owners) w	he name, title, ith the primary	race/ethnic responsibil	city, and g	gender of ead following:	ch individual
		Name and tit			D/	nicity/
a. Check signing	ı				901100	
· . ·						

	Name and title	Race/ethnicity/
b. Payroll signing		
c. Signing, or guaranteeing loans		
d. Acquiring lines of credit		
e. Acquiring surety bonding and insurance		
f. Purchasing major equipment/services		
<ul> <li>g. Signing contracts/change orders/payment requisitions</li> </ul>		
h. Estimating		
<ul> <li>i. Qualifying the company for professional/trade license(s)</li> </ul>		
j. Marketing/sales		
k. Hiring and firing managerial employees		
Hiring and firing     non-management employees		
m. Supervising field/		
n. Supervising office personnel		
PERSONNEL: Identify the purchase		

6. <u>PERSONNEL:</u> Identify the number of individuals, including owners, that are currently employed by the business in the following areas:

Please use the following to classify women/minority persons: AM-African American male, AF-African American female, HM-Hispanic male, HF-Hispanic female, WM-Non Hispanic White male, WF-Non Hispanic White female.

	•	Total Number of Employees	AM	AF	НМ	HF	WM	WF
	a. Management							-
	b. Administrative/clerical							
	c. Professional/technical							
	d. Craftsperson/laborers							
		ness affirmative action statement, if						
7.	BUSINESS RELATIONSHIPS:	Provide the requested information for	or eac	h of t	he fo	llowii	ng:	
	Address:							
	Agent name:	Phone	numb	er:			·	
	Single Contract Limit:	Aggregate						
	b. Bank(s) Name(s): Branch:							
	Contact person:	Phone i						
	Credit limit:	Fnone	numbe	er:				
,		ditors including banks and the amour		none	y owe	ed to:		
	<u>Creditor</u> <u>L</u>	oan Guarantor(s) Address	& tele	phon	<u>e</u>	:	Loar Amou	
C	d. Insurance company:							
	Type of insurance:	Insurance lim	its: _					

Contract/job type	Contact person	Telephone <u>number</u>	Contract amount
EQUIPMENT: List the ty	ype and value of major equ	uipment that is ow	ned (O) or lea
<u>Equipment</u>	<u>O/L</u>	<u>Va</u>	lue (\$ amount
<u>Equipment</u>	<u>O/L</u>	<u>Va</u>	lue (\$ amount

#### M/WBE CERTIFICATION APPLICATION

#### **AFFIDAVIT**

STATE OF:	
COUNTY OF SS	3
I hereby declare and affirm that I am the of:	(Tit(e)
That I am duly authorized to execute the contents of said documents are complete, hereby certify that the documents include lawful owners of the subject business eresponsibility to submit an updated Mino whenever a change occurs in ownership, applicant, certified M/WBE principal(s) and concern as an M/WBE, or is a party to suc	foregoing M/WBE Certification Application, and that the true and correct to the best of my knowledge and belief. I all material information necessary to identify the true and enterprise. Further, the undersigned is notified of their crity/Woman Business Enterprise Certification Application management or control of the company. Any M/WBE all related parties, who misrepresents the status of any ch misrepresentation to obtain business or contracts with looment and Assistance Program, will be accounted for
	Minority/Woman Owner's Signature
	egoing affidavit, who acknowledged that he lebe aveguted
IN WITNESS WHEREOF, I have hereu	into set my hand and official seal.
	Notary Public
	My Commission Expires:

#### M/WBE Certification Check List

Please attach copies, not originals, of all applicable items. Incomplete applications cannot be processed, and failure to submit the documents will delay or result in termination of the application process.

Ple	ase c	heck if documents are attached:
1.		M/WBE certifications from other public agencies.
2.		M/WBE Certification Application Affidavit (Page 6 of Application).
3.		Miami-Dade County Public Schools Vendor Application.
4.		Lease/purchase agreement for the business' facilities.
5.		Current professional/business license(s).
6.		Proof of citizenship or permanent resident status.
7.		Resumes for owners and key personnel.
8.		Lease/purchase agreements for major business equipment.
9.		Most current application for bonding, if applicable.
10.		Management agreement(s).
11.		Loan agreement(s) or promissory note(s).
12.		Birth certificate, drivers license, passport or any other document which substantiates the ethnicity/race/gender of owners, officers and directors.
*If state	any (	of the aforementioned documents are not available, please provide a written notarized that information is not available.
13.	Sole	Proprietor - Submit all of the above items, as applicable and the following:
		U.S. IRS 1040-C Schedule.
		Fictitious name affidavit, if applicable.

14.	Par	tnerships - Submit all of the above items, and the following:
		Partnership agreement(s). U.S. IRS 1065, with schedules. Profit sharing agreements.
15.	Cor	porations - Submit all of the above items, and the following:
		Articles of Incorporation, with amendments.  By-Laws, with amendments.  The most current U.S. IRS Corporate Tax Return 1120 or 1120s, with all schedules.  All issued and cancelled stock certificates (front & back).  Minutes of the first shareholders' meeting.  Minutes of the first board of directors' meeting.  Minutes of meetings at which the current board of directors and officers were elected or appointed.
		Stock transfer ledger.  Most current annual report filed with the Secretary of State.  Profit sharing agreement(s).  Agreements affecting management, control or rights of any stockholder(s).
16.		Joint venture agreement(s).
17.		Certificate(s) of insurance.
18.		Sub-contractual agreement(s).
NOT		after filing this application, there is any significant change in the information submitted rein, you must inform the Division of Business Development and Assistance of the change, the company may be denied certification.
	• • • • • • • • • • • • • • • • • • • •	ertified companies must inform the Division of Business Development and Assistance of any anges in the information contained herein, which formed the basis of certification. Failure to so may result in denial, revocation or suspension of certification.
COMI	SHO	E APPLICATION, INCLUDING VENDOR APPLICATION AND CATEGORY OF GOODS AND SERVICES  ULD BE RETURNED TO:  MIAMI-DADE COUNTY PUBLIC SCHOOLS  DIVISION OF BUSINESS DEVELOPMENT AND ASSISTANCE  1450 N.E. 2ND AVENUE, ROOM 456  MIAMI, FL 33132