



STATE OF INDIANA
Mike Braun, Governor

Department of Administration
Procurement Division
402 W Washington Street, Room W468
Indianapolis, Indiana 46204

Award Recommendation Letter

Date: May 22, 2025

To: Jennifer Jansen, Procurement Director,
Indiana Department of Administration

From: Angie Alexander, Procurement Specialist,
Indiana Department of Administration

Subject: Recommendation of Selection for RFP 25-80582: Self-Direction Financial Management Services

Based on its evaluation of responses to RFP 25-80582, it is the evaluation team's recommendation that **Acumen Fiscal Agent, LLC** be selected to begin contract negotiations to provide Self-Direction Financial Management Services for the Family and Social Services Administration (FSSA).

*Acumen Fiscal Agent, LLC has committed to subcontract 8.00% of the contract value to **Professional Management Enterprise, Inc.**, a certified Minority-owned Business (MBE), 11.00% of the contract value to **#1 Strategic Solutions, LLC (d/b/a Strategic Solutions)**, a certified Women-owned Business (WBE), and 3.00% of the contract value to **Summit Managed Solutions**, a certified Indiana Veteran-Owned Small Business (IVOSB).*

The terms of this recommendation are included in this letter.

Estimated four (4) year Contract Value: \$16,849,000.00

The evaluation team received six (6) proposals from:

1. Acumen Fiscal Agent, LLC. (Acumen)
2. Guardiantrac, LLC (d/b/a GT Independence) (GT Independence)
3. Maxim Healthcare Services, Inc. (Maxim)
4. Palco, Inc. (Palco)
5. Public Partnerships, LLC (PPL)
6. The TLC House and Residential Services, LLC (TLC House)

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)	50
3. Cost (Cost Proposal)	30

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 (50 Points)

The six (6) 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
- Diversity, Equity, and Inclusion Information
- References
- Background
- Self-Directing Individual Support, Employee Support, Payroll Management
- Systems Interfaces, Data and Records Management
- Staffing
- Communications
- HIPAA Compliance and Protected Health Information (PHI) Privacy Standards, Security
- Other Responsibilities
- Transition Requirements
- Fraud, Abuse, and Neglect Management
- IN PathWays for Aging Interface

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 50 pts.
Acumen	32.75
GT Independence	28.25
Maxim	11.25
Palco	35.50
PPL	22.00
TLC House	0.50

C. Cost Proposal (30)

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

Score =

- If Respondent's Cost amount is lowest among all Respondents, then score is 30.
- If Respondent's Cost amount is NOT lowest among all Respondents, then score is:

$$30 * \frac{(\text{Lowest Respondent's Cost Amount})}{(\text{Respondent's Cost Amount})}$$

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

Table 2: Cost Scores - Round 1

Respondent	Cost Score 30 pts.
Acumen	20.97
GT Independence	11.23
Maxim	7.59
Palco	28.15
PPL	30.00
TLC House	1.02

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.
Acumen	53.72
GT Independence	39.48
Maxim	18.84
Palco	63.65
PPL	52.00
TLC House	1.52

With IDOA approval, the evaluation team elected to shortlist Acumen, GT Independence, Palco, and PPL based on Round 1 Total Scores. The evaluation team elected to invite the four (4) shortlisted Respondents to give oral presentations. Additionally, the evaluation team issued clarification questions and a request for Best and Final Offers (BAFOs) to the shortlisted Respondents.

Prior to the oral presentations and the submission of Best and Final Offers, PPL requested to withdraw from consideration.

E. Post Clarifications, Oral Presentations and BAFO Evaluations

The remaining shortlisted Respondents' cost scores were updated based on their BAFOs. The remaining shortlisted Respondents' MAQ scores were reviewed based on the responses to the clarification questions and the oral presentations. The scores for the remaining shortlisted 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 (50)	Cost Score (30)	Total Score (80)
Acumen	32.75	22.34	55.09
GT Independence	31.75	18.60	50.35
Palco	35.75	30.00	65.75

Following Clarifications, Oral Presentations, and BAFOs, and with IDOA approval, the evaluation team issued a Request for Target Pricing to shortlisted Respondents due to newly identified budgetary constraints.

F. Target Pricing

Cost scores were updated based on Target Pricing responses (as well as related updates to MBE/WBE/IVOSB subcontractor commitments). The scores for the shortlisted Respondents after Target Pricing were as follows:

Table 5: Post-Target Pricing - Evaluation Scores

Respondent	MAQ Score (50)	Cost Score (30)	Total Score (80)
Acumen	32.75	29.74	62.49
GT Independence	31.75	29.95	61.70
Palco	35.75	30.00	65.75

G. IDOA Scoring

IDOA scored the Respondents 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 clarifies 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 6: Final Evaluation Scores

Respondent	MAQ Score	Cost Score	MBE*	WBE*	IVOSB*	Buy Indiana	Total Score
Points Possible	50	30	5 (+1 bonus pt.)	5 (+1 bonus pt.)	5 (+1 bonus pt.)	5	100 (+3 bonus pts.)
Acumen	32.75	29.74	5.00	5.00	5.00	0	77.49
GT Independence	31.75	29.95	-1.00	0.45	0.80	0	61.95
Palco	35.75	30.00	-1.00	-1.00	-1.00	0	62.75

* 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

The term of the contract 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.