

PRE-PROPOSAL MEETING
FOR
REQUEST FOR PROPOSAL ASSET VERIFICATION SYSTEM SERVICES

CONTRACT NO.: FIA/AVS/17-001-S

AUGUST 18, 2016
311 West Saratoga Street
Fifth Floor
Baltimore, Maryland 21201

9:30 a.m. - 10:22 a.m.

PRESENT FROM DHR:

JAMES REDDITT, Procurement Officer

VIRGINIA JOHNSON, Family Investment Administration

DEBORAH RIZZO, Family Investment Administration

AUDREE WATKINS, Department of Health and Mental
Hygiene

HUBERT CHANG, ESQUIRE, Office of the Attorney
General

ALSO PRESENT:

PETER CHEESMAN, Public Consulting Group

MIRANDA SHEPHARD, Shephard & Associates

REPORTED BY: KATHLEEN A. COYLE, Notary Public

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P R O C E E D I N G S

1
2 MR. REDDITT: Good morning everyone. My name
3 is James Redditt, and I would like to welcome you all
4 to the Department of Human Resources. This morning
5 we'll be discussing information regarding the request
6 for proposals entitled asset verification system
7 services. The agency control number for this RFP is
8 FIA/AVS/17-001-S.

9 Please know that Hunt Reporting is
10 transcribing this conference. And when you ask
11 questions I ask that you please state your name and the
12 name of your company for the record. And a transcript
13 of the conference will be available on eMaryland
14 Marketplace and the DHR website. I'm going to ask the
15 persons that are representing the State to introduce
16 themselves, and then I will have you introduce yourself
17 for the record, and then we can continue from there.
18 So I will start from the far end there.

19 MS. WATKINS: Good morning. My name is Audree
20 Watkins. I'm the deputy director for eligibility for
21 the Department of Health and Mental Hygiene.

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1 MS. JOHNSON: Good morning. I'm Virginia
2 Johnson. I'm the director of the bureau of long term
3 care.

4 MS. RIZZO: Hi. I'm Debbie Rizzo. I'm the
5 State technical administrator at the bureau of long
6 term care.

7 MR. CHANG: I am Hubert Chang. I am with the
8 Office of the Attorney General.

9 MR. REDDITT: And you are, sir?

10 MR. CHEESMAN: Peter Cheesman with Public
11 Consulting Group.

12 MR. REDDITT: Great. Okay. We're going to
13 get to the information regarding the RFP. First of
14 all, some general information.

15 The Department is issuing this RFP to obtain
16 asset verification system services that will deliver
17 electronic data of the liquid and real property assets
18 of applicants for medical benefits, for age, blind or
19 disabled persons and applicants for Medicaid benefits
20 for long term care.

21 The AVS system encompasses two distinct

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1 functional areas. Functional area one, which is assets
2 held by financial institutions, and financial area two
3 which is real property assets.

4 The anticipated duration of services for this
5 contract is for one year with two one-year renewal
6 options at the State's discretion. The Department
7 intends to make up to two awards, one for each
8 functional area as a result of this RFP. However, a
9 single contractor could possibly be awarded a contract
10 to provide services for both functional areas.

11 For the purposes of this RFP the procurement
12 officer, which is myself, is the only point of contact
13 between the State and the vendor community. I ask you
14 please do not contact any other State representative
15 regarding questions concerning the RFP, that all
16 questions should be directed to my attention, and
17 preferably questions should be sent via email, or you
18 can make them after my comments here.

19 In order to receive a contract award your
20 company must be registered on eMaryland Marketplace and
21 you're required to indicate your eMaryland Marketplace

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1 vendor ID number in your transmittal letter included in
2 your proposal submission.

3 Responses to all questions submitted in
4 response to this RFP will be posted on eMaryland
5 Marketplace and the DHR website with sufficient time to
6 allow offerors to review them to assist with
7 formulating their proposal submissions.

8 As far as the proposal submission, we need an
9 unbound original and five copies of the technical and
10 financial proposals. And they are due by three p.m.,
11 on Monday, November 19th in order to be considered.
12 Requests for any extensions at this time will not be
13 granted. Proposals received after the due date and
14 time cannot and will not be accepted except as provided
15 under the provisions of COMAR 21.05.03.02F, and
16 21.05.02.10. If you're mailing your proposal please
17 make sure that you mail them with sufficient time to
18 ensure that it is received by me by the proposal due
19 date and time.

20 Although we are accepting proposals for two
21 different functional areas, multiple or alternate

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1 proposals will not be accepted for this RFP. Make sure
2 you give specific attention to the clear identification
3 or portions of your proposal that's considered
4 confidential and/or proprietary and provide
5 justification why such material should not be disclosed
6 by the State under the Public Information Act. This
7 confidential and/or proprietary information should be
8 identified by page and section number and placed after
9 the title page and before the table of contents in the
10 technical proposal. In addition, a redacted version of
11 your proposal will be required to be submitted. And
12 we'll discuss that a little bit later.

13 Section 1.25 of the RFP talks about the bid
14 proposal affidavit, which is attachment "B" of the RFP.
15 This form must be completely filled out and submitted
16 with your technical proposal. And you only need to
17 submit one copy with your original technical proposal.
18 You don't need to submit the five copies with the other
19 copies of the proposal. Please ensure that each
20 section of the affidavit is completed. If you have no
21 exceptions to the specific section of the bid proposal

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1 affidavit in question please enter your initials in
2 that section indicating such.

3 Section 1.28 is verivication of registration
4 and tax payment. Before a business entity can do
5 business with the State it must be registered with the
6 State Department of Assessments and Taxation. It is
7 strongly recommended that any potential offeror
8 complete their registration prior to the due date for
9 receipt of proposals, or if you are already registered
10 make sure that you review your registration information
11 to ensure that it is accurate and up to date. This
12 information includes the corporate name, the address,
13 and the name and address of the resident agent that you
14 have on file. An offeror's failure to do so may result
15 in an otherwise successful proposal being dropped from
16 consideration for contract award.

17 Section 1.36 is the conflict of interest
18 affidavit and disclosure. And you're required to
19 complete and sign the conflict of interest affidavit
20 and disclosure, which is attachment "I," and submit it
21 with your proposal. And all offerors are advised that

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1 if a contract is awarded as a result of this
2 solicitation the successful contractor's personnel who
3 perform or control work under this contract and each of
4 their participating subcontractor personnel will
5 perform or control work under this contract shall be
6 required to complete agreements substantially similar
7 to attachment "I."

8 Section 1.37 is the non-disclosure agreement.
9 All offerors are advised that this solicitation and any
10 resulting contract or contracts are subject to the
11 terms of the non-disclosure agreement contained in
12 attachment "J." This agreement must be provided within
13 10 business days of notification of proposed contract
14 award. However, to expedite processing it is suggested
15 that this document be completed and submitted with your
16 technical proposal.

17 Section 1.34, which I skipped over, is the
18 living wage section. And this contract is subject to
19 the Maryland living wage law. You're required to
20 complete attachment G-1, which is a living wage
21 affidavit of agreement. And that must be submitted

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1 with your technical proposal. Failure to submit and
2 complete this affidavit could result in a determination
3 that the offeror is deemed not responsive. If the
4 living wage rates change during the term of the
5 contract the contractor must account for that in their
6 proposal submission. They cannot change the contract
7 price during the term of the contract for any change in
8 the living wage rates.

9 And with that, I'm going to turn this portion
10 of the conference over to Ms. Virginia Johnson who will
11 discuss the scope of work in section three.

12 MS. JOHNSON: Good morning. The bureau of
13 long term -- just give you some background also. The
14 bureau of long term care provides eligibility
15 determinations for four major Metros. We're looking at
16 the RFP, the vendor to provide services to all local
17 Departments of Social Services that determine medical
18 assistance, Medicaid.

19 The scope of work requirements under two
20 functional areas. I'll cover the first functional area
21 of financial asset verification. The contractor shall

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1 provide a financial asset verification services that
2 meets the following functional requirements: The
3 financial AVA's application shall provide a user
4 interface from which each active user may request a
5 financial asset verification report for an applicant,
6 recipient, or responsible party that will identify
7 accounts, whether opened or closed, in which the
8 applicant, recipient, or responsible party held
9 ownership and that had a positive account balance
10 within a specified date range. The specified date
11 range will not exceed a 60-month period within the 96
12 months immediately preceding the date of request. The
13 date range will generally include the 60 months
14 immediately preceding the first date of the month in
15 which the applicant or recipient applied for program
16 benefits. The financial asset verification report
17 shall include, at minimum, the following specific
18 information regarding each account: The name of the
19 financial institution holding the account, along with
20 the branch location, address, and telephone number
21 where the account is serviced; the type of account,

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1 checking, savings, annuity, retirement, et cetera, and
2 the last four digits of the account number; the full
3 legal name of each individual account or entity with
4 any ownership interest in the account, any known alias'
5 used by an individual, any known residence or mailing
6 address of the individual during the specified date
7 range, and the nature by which ownership interests are
8 shared, if applicable, that's joint tenant account,
9 such as a joint tenant account; the date the account
10 was opened and, if closed, the date closed; and the
11 account balance in the account at 12:01 a.m. on the
12 first date of each month in which the account was open
13 during the specified date range. And there is an
14 attachemnt "Q" for your reference.

15 The financial ABS application shall generate
16 the financial asset verification report by issuing
17 electronic requests to target financial institutions
18 and receiving electronic responses from those
19 institutions. The application cannot be based on
20 mailing paper-based requests and/or receiving paper-
21 based responses. The financial ABS application must

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1 submit electronic requests for account information to
2 target financial institutions with whom the contractor
3 has established relationships to respond to such
4 requests and who collectively hold a substantial
5 proportion of financial assets owned by applicants,
6 recipients, and responsible parties.

7 Functional area two, real property asset
8 verification services. The contractor shall provide a
9 real asset verification service application that meets
10 the following functional requirements: The real
11 property AVS application shall provide a user interface
12 from which each active user may request a real property
13 asset verification report from an applicant, recipient,
14 or a responsible party that will identify real property
15 owned, in whole or in part, by the applicant, the
16 recipient, or the responsible party at any point in
17 time within a specified date range. The specified date
18 range will not exceed 60-month period within the 96
19 months immediately preceding the date of request. The
20 date range will generally include the 60 months
21 immediately preceding the first date of the month in

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1 which the applicant or recipient applied for program
2 benefits.

3 The real property asset verification report
4 shall include, at a minimum, the following specific
5 information for each such piece of real property
6 identified: sufficient information to identify the
7 property, including but not limited to its address,
8 location, any plat or tax identification number
9 assigned to the property, the governing jurisdiction
10 where title is registered, et cetera; the assessed
11 value of the property by the relevant taxing authority
12 and the name of the taxing authority; the names of any
13 co-owners of the property and the transaction history
14 of the property, if available, including the dates,
15 prices, and parties involved in the most recent sale or
16 transfer of the property involving the applicant,
17 recipient, or responsible party, and the type of
18 transaction. Attachment "R" is an illustrative sample
19 real property asset verification report.

20 The real property AVS application must
21 utilize a detailed methodology for searching for real

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1 property assets owned in whole or in part by the
2 applicant, recipient, or responsible party across a
3 broad defined, geographic spectrum.

4 General application requirements for
5 applications in both functional areas. The contractor
6 shall configure the financial AVS application and/or
7 the real property AVS application as appropriate,
8 either or both are referred to hereafter as the
9 "application," with the following requirements:
10 Controlled access by approximately 120 active users
11 among State personnel, including approximately 50
12 concurrent users, over the internet; application
13 availability 24 hours per day, seven days a week, except
14 that the contractor may schedule periodic, planned
15 service outages outside normal operating hours for
16 purposes of system maintenance and upgrades.
17 Immediately upon the submission of a report request the
18 application must notify the user that the request has
19 been submitted along with a unique record identifier
20 code, such as a tracking number. The application must
21 generate the requested asset verification report within

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1 15 days from the date of request. On the same day that
2 the report is available the application must notify the
3 user who requested the verification report, along with
4 a designated alternate, by email that the report is
5 available for download and identify the report with its
6 unique record identifier code. The completed report
7 must be available for download through the application
8 in Adobe PDF format. If the report does not identify
9 any assets, the report shall state that no assets were
10 located. The download method must adhere to security
11 requirements/encryption standards identified in section
12 3.2.5.C. The application must allow all users to
13 search for pending requests and completed reports by
14 Social Security Number, the name of the applicant,
15 recipient, or responsible party, or by a unique code,
16 record identifier code.

17 Technical support and training for
18 applications in both functional areas. The contractor
19 shall provide a help desk that allows users to obtain
20 technical assistance from the contractor during normal
21 operating hours for all users of the application. The

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1 contractor shall provide a printable online user manual
2 that assists users in navigating and using the
3 application. The manual shall be updated whenever
4 changes are made to the application.

5 Technical requirements for applications in
6 both functional areas. The contractor shall ensure
7 that the application utilizes established technical and
8 security protocols recognized in the industry as
9 appropriate for the transition of the highly sensitive
10 financial information identified in the scope of work,
11 such as the U.S. Commerce Department's National
12 Institute of Standards and Technology.

13 The contractor shall implement the following
14 authorization controls: a document process to ensure
15 that DHR users access privileges are verified at least
16 quarterly; an automated process to ensure that
17 individual user sessions time out or request users to
18 re-enter their password after a period of 15 minutes of
19 inactivity; an automated process to disable user
20 accounts after three failed login attempts; a
21 documented process to ensure that users access rights

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1 are revoked within 24 hours receiving notification from
2 the State project manager; an automated process to
3 ensure that user IDs are disabled after 60 days of
4 inactivity unless they are extended through the written
5 request of the State project manager; a documented
6 process to ensure that all default access capabilities
7 are removed, disabled, or protected to prevent
8 unauthorized use; a process or system to ensure that
9 access privileges are traceable to a unique user ID; an
10 automated display, after a successful logon, showing
11 that the date and time of the last successful logon and
12 the number of unsuccessful logon attempts since the
13 last logon -- since the last successful logon; and an
14 automated mechanism to only permit access to the AVS
15 from State authorized network IP addresses.

16 Password requirements. The contractor shall
17 require a secured logon and password to access the
18 application. The application shall force users to
19 change temporary passwords at the first logon and shall
20 prohibit password reuse by not allowing the last 10
21 passwords to be reused with a minimum password age of

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1 at least two days. Three failed attempts per user to
2 access or modify files, password tables, or security
3 devices shall lock out the user account. Passwords
4 shall not be used as the user ID -- be the same as the
5 user ID, excuse me, be stored in clear context, be
6 displayed on the screen or contain leading or trailing
7 blanks. Passwords shall be a minimum of eight
8 characters, consist of mixed alphabetic, special
9 character and numeric characters, not consist of all
10 numbers, all special characters, or all alphabetic
11 characters, and be changed every 90 days. Automatic
12 mechanisms shall prompt users of this requirement.

13 Confidential information security
14 requirements. The contractor shall keep confidential
15 information from public disclosure. Confidential
16 information is non-public information that if disclosed
17 could result in a high negative impact to the State of
18 Maryland, its employees or citizens and may include
19 information or records deemed as private, privileged,
20 or sensitive. This includes but is not limited to
21 information that contains personally identifiable

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1 information, the Social Security Numbers, names, phone
2 numbers, addresses, and/or dates of birth. The
3 contractor shall safeguard confidential information by
4 incorporating, at a minimum, the following security
5 measures: The contractor shall not place confidential
6 or sensitive data on any application servers, database
7 servers, or infrastructure components that require
8 direct access from the internet. Components that meet
9 these criteria must be placed behind a de-militarized
10 zone where they are not accessible from the internet
11 and can only interact with DMZ components through a
12 firewall.

13 Encryption. All data transmissions for
14 operations shall use an SSL encryption algorithm to
15 encode data transmission that is federal information
16 processing standards 140-2 compliant. The details can
17 be found at www.nist.gov. The contractor shall
18 establish appropriate procedures to protect documents,
19 computer media, information, data, and system
20 documentation from unauthorized disclosure,
21 modification, removal, and destruction, including

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1 suitable measures to properly dispose of media when it
2 is no longer needed.

3 The contractor -- I'm sorry. "D," 508
4 compliance. The contractor shall ensure that the
5 application complies with the federal guidelines for
6 web accessibility available at www.section508.gov.

7 Auditing. The system shall require all
8 identification and authentication activities be logged
9 and maintained. The audit trails shall include at
10 least the following information at a minimum: date and
11 time of event, user ID, type of event, success or
12 failure of event, and source, such as terminal, port
13 location, IP address, --

14 MR. REDDITT: Excuse me. Virginia, can we
15 kind of like just summarize, you know, what the main
16 things in each section so that we can, you know, just
17 get the general gist of what --

18 MS. JOHNSON: Okay.

19 MR. REDDITT: -- of what the main
20 requirements are?

21 MR. CHEESMAN: Should questions be asked

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1 throughout or at the end?

2 MR. REDDITT: There's going to be a period to
3 ask some questions at the end.

4 MR. CHEESMAN: Okay. Thank you.

5 MR. REDDITT: Sure.

6 MS. JOHNSON: Okay. For security incidents,
7 we're looking for the contractor to investigate and
8 document all security incidents including violations.
9 If there are three failed attempts per single user the
10 account should be locked out, disabled logging, or
11 attempts to disable logging. We're looking for two or
12 more failed attempts to access AVS within a five-week
13 -- within a week, which is five business days, from
14 network resource the user should be logged out. An
15 unauthorized attempt to modify software or hardware.
16 We need to know any security violations almost
17 immediately as they happen so we can address them.

18 Staff for the application in both functional
19 areas. The contractor shall designate a contractor's
20 project manager as key personnel. This will allow
21 contract with the State project manager to communicate

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1 with you will be the main point of contact for any type
2 of security violations.

3 Reporting requirements. We've actually set
4 up, and there are reports that area attached, of what
5 we're looking for specifically. And I guess we'll go
6 into that when we look at the report exactly what we're
7 looking for rather than reading it verbatim.

8 MR. REDDITT: Yeah.

9 MS. JOHNSON: Does everyone have a copy of
10 these reports?

11 MR. REDDITT: They should.

12 MS. JOHNSON: Okay. What we're looking for,
13 we're looking for bi-weekly. And do you have a copy of
14 this report?

15 MR. CHEESMAN: I do.

16 MS. JOHNSON: Okay. We're looking for bi-
17 weekly status report for financial asset verification
18 systems. The specific headers that are addressed,
19 we're looking for every detail that's listed on the
20 header. And we can go into more conversation about
21 them when you start asking questions. We're also

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1 identifiable information or personal public health
2 information is adequately protected from disclosure.
3 Such independent assessments of the contractor's
4 security controls shall include a SOC 2, type two
5 audit, or an equivalent and maintain ISO 27001
6 certification. And the audit shall be performed at the
7 contractor's expense and are subject to the conditions
8 that are listed in this section of the RFP.

9 In event that deficiencies are identified in
10 the SOC audit requirement corrective action plan, the
11 project manager, that's Virginia, will notify the
12 contractor in writing within 30 calendar days. The
13 contractor shall submit the CAP to the state project
14 manager within 30 calendar days after receipt of
15 written notification that the CAP is required. The
16 contractor's CAP shall describe in detail the remedial
17 actions that will be taken by the contractor to resolve
18 the deficiencies and the time line. If the contractor
19 currently has an annual data security assessment
20 performed that include the operation systems and
21 repositories of the services being provided and if that

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1 assessment conforms to the content and objectives of
2 the guide for SOC audit the state project manager will
3 determine, in consultation with the appropriate state
4 government technology and auditing authorities whether
5 the contractor's current audits are acceptable in lieu
6 of a SOC audit.

7 Now, let's talk about section four, which is
8 proposal submission, which is what I'm concerned about.

9 The proposal submission. This is two
10 volumes, the technical proposal and the financial
11 proposal, and each one should be separately sealed from
12 one another. It is referred but not required that the
13 name, email address, and telephone number of the
14 offeror be included on the outside of the packaging for
15 each volume. Each volume shall contain an unbound
16 original, so identified, and five copies. And the
17 copies can be found if you prefer. Unless the
18 resulting package will be too unwieldy, the State
19 prefers that the two sealed volumes be submitted
20 together in a single package, which includes a label
21 bearing the following information: The RFP title and

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1 the agency control number, the functional area
2 addressed in the proposal, the name and address of the
3 offeror, and the closing date and time for receipt of
4 proposals.

5 An electronic version, either on CD or DVD,
6 of the technical proposal in Microsoft Word format must
7 be included with the original technical proposal. An
8 electronic version in CD or of the financial proposal
9 in Microsoft Excel format must be enclosed with the
10 original financial proposal. CDs or DVDs must be
11 labeled on the outside with the RFP title, agency
12 control number, functional area, name of the offeror,
13 and volume number. CDs or DVDs must be packaged with
14 the original copy of the appropriate proposal, either
15 technical or financial.

16 A second electronic version of volume one and
17 volume two in searchable Adobe pdf format shall be
18 submitted on a CD or DVD for Public Information Act
19 requests. This copy shall be redacted so that
20 confidential and/or proprietary information has been
21 removed. All pages of both proposal volumes shall be

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1 consecutively numbered from beginning, page one, to the
2 end, page whatever. So with your technical proposal
3 you're going to submit a hard copy, an original hard
4 copy, five copies, a CD in Word format or DVD and a CD
5 or DVD in pdf that is redacted and used for Public
6 Information Act requests. Okay?

7 Please note that there should be no pricing
8 information included in the technical proposal. All
9 pricing information shall be included only in the
10 financial proposal, which is volume two. The technical
11 proposal shall include the following documents and
12 information in the order specified. Each section of
13 the technical proposal shall be separated by a tab and
14 labeled as the following: the title page and table of
15 contents submitted under tab "A." Claim of
16 confidentiality, if applicable, submitted under tab A1.
17 Transmittal letter submitted under tab "B." The
18 transmittal letter shall include the following
19 information: the name and address of the offeror;
20 name, title, email address and telephone number of the
21 primary contact for the offeror, the solicitation title

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1 and agency control number that the proposal is in
2 response to, including the functional area being
3 served; signature, typed name and title of an
4 individual authorized to commit the offeror to its
5 proposal; the federal employer identification number of
6 the offeror; the offeror's eMaryland Marketplace
7 number; the offeror's MBE certification number, if
8 applicable; the offeror's SBR certification number if
9 applicable; the offeror's veteran owned small business
10 enterprise certification number if applicable;
11 acceptance of all State RFP and contract terms and
12 conditions. If any exceptions are taken they are to be
13 noted in the executive summary. And acknowledgment of
14 all addenda that have been issued to the RFP.

15 Under tab "C," that's where the executive
16 summary would go. Tab "D" would include any minimum
17 qualifications documentation. Tab "E" will include
18 any offeror technical response to the RFP requirement
19 and proposal work plan. Tab "F" will include the
20 offeror's qualifications and capabilities. Tab "G"
21 will include the experience and qualifications of

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1 proposed staff, including any proposed subcontractors.
2 Under tab "H," that will be where your references would
3 go. Tab "I" would include the list of current and/or
4 prior State contracts. Tab "J" will include your
5 financial capability information. Tab "K" will include
6 your certificate of insurance. Tab "L" will be any
7 information regarding any subcontractors you may
8 propose to use. Tab "M" is the legal action summary.
9 And again, all of these sections are stated further in
10 section four of the RFP. Tab "N" would include the
11 economic benefits factors information. And tab "O"
12 would be any additional required technical submissions.
13 And this is the section where all of the required forms
14 to be submitted with your technical proposal are to be
15 submitted.

16 In section 4.5 of the RFP, and this talks
17 about the financial proposal, under separate sealed
18 covered from the technical proposal, and clearly
19 identified in the format identified in section 4.2, the
20 offeror shall submit an original unbound copy, five
21 copies, and an electronic version in Microsoft Excel of

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1 the financial proposal. The financial proposal shall
2 contain all price information in the format specified
3 in either attachment F1 and/or attachment F2. The
4 offeror shall complete the financial proposal form only
5 as provided in the financial proposal instructions and
6 the financial proposal form itself.

7 Moving onto section five, which is the
8 evaluation of the proposals. Evaluation of proposals
9 will be performed in accordance with COMAR 21.05.03 by
10 a committee established for that purpose and based on
11 the evaluation criteria set forth in the RFP. The
12 evaluation committee will review proposals, may
13 participate in offeror oral discussions, and will
14 provide information to the procurement officer. The
15 Department reserves the right to utilize the services
16 of individuals outside the established evaluation
17 committee for advice and assistance as deemed
18 appropriate.

19 The evaluation criteria to be used to
20 evaluate each technical proposal are listed in
21 descending order of importance, and they are the

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1 following: offeror's technical response to RFP
2 requirements and work plan, offeror's qualifications
3 and capabilities, experience and qualifications of
4 proposed staff, including any proposed subcontractors
5 and economic benefits to the State of Maryland.

6 Section 5.2. And we're talking about the
7 evaluation criteria. All qualified offerors will be
8 ranked from the lowest, which is most advantageous, to
9 the highest, the least advantageous, price based upon
10 the offeror's total three-year price, which is
11 encompassing the one-year base and the two-year renewal
12 options. Within the stated guidelines set forth in
13 this RFP and as submitted on attachment one and/or
14 attachment F2.

15 Section 5.5, selection procedures.
16 Technical proposal are evaluated for technical merit
17 and ranked. During this review oral presentations
18 and/or discussions may be held. The purpose of such
19 discussions will be to ensure a full understanding of
20 the stated requirements and the offeror's ability to
21 perform the services as well as to facilitate arrival

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1 at a contract that is most advantageous to the State.
2 Offerors will be contacted by the State as soon as any
3 discussions are scheduled. Offerors must confirm in
4 writing any substantive oral clarifications of and/or
5 changes in their technical proposals made in the course
6 of discussions. Any such written clarifications or
7 changes then become a part of the offeror's technical
8 proposals. Technical proposals are then given a final
9 review and they are ranked. Following the technical
10 evaluation the financial proposals of each qualified
11 offeror will be evaluated and ranked separately from
12 the technical evaluation. When in the best interest of
13 the State the procurement officer may permit qualified
14 offerors to revise their initial proposals and submit
15 in writing best and final offers. The State may make
16 an award without issuing a request for a BAFO.

17 Upon completion of the technical and
18 financial proposal evaluations and rankings each
19 offeror will receive an overall ranking for their
20 proposal. The procurement officer will recommend award
21 to the contract to responsible offeror or offerors that

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1 submitted the proposal deemed to be the most
2 advantageous to the State considering price and
3 financial factors. In making this most advantageous
4 proposal determination technical and financial factors
5 will carry equal weight in the evaluation. And at this
6 time we will open the floor for any questions. Again,
7 I ask if you have questions to please state your name
8 and the name of your company for the record.

9 MR. CHEESMAN: Peter Cheesman, Public
10 Consulting Group. Does the State have a preference for
11 a single solution heading both functional areas one and
12 two or two separate solutions?

13 MS. JOHNSON: I think we'd like to get them
14 at the same time if we could. That would be -- now,
15 you're asking do we want the real property and the
16 financial assets at the same time?

17 MR. CHEESMAN: Within the same web
18 application or within a separate web application?

19 MS. JOHNSON: I think separate web
20 applications. I would think we would want separately
21 because we have to upload this information. It would

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1 be separate. I'm always looking at you for something.

2 MR. REDDITT: If you're asking whether we
3 would prefer one award or two, we can make up to two
4 awards. We want to have both. It's up to the offeror
5 to determine how best they wish to provide the State
6 with the service that we're asking for, whether you
7 want to do it as two separate solutions or if you feel
8 that your company is able to provide both solutions.
9 You can submit proposals for both the real property and
10 the financial assets. I mean, they are two functional
11 areas, so they'll be looked at individually, they'll be
12 evaluated individually. They won't be evaluated as one
13 proposal. We will evaluate the ones that are providing
14 financial and the ones that are providing the real
15 estate. If one company is awarded both contracts, it's
16 easy for us.

17 MR. CHEESMAN: That makes sense. Okay.
18 Thank you.

19 MR. CHANG: There is no preference --

20 MR. REDDITT: No preference.

21 MR. CHANG: -- for one vendor to provide

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1 a service of both functional areas.

2 MR. REDDITT: No. We are issuing them as
3 separate awards.

4 MR. CHEESMAN: Thank you. My question was
5 more around the system itself, where the workers will
6 log in and access this information. Does the State
7 prefer that workers log into two separate systems to
8 access property and financial information?

9 MR. CHANG: And currently there is no
10 preference for whether it is one system or two systems.
11 Your proposal will be evaluated for each individual
12 area. If it is the same system or if it's two
13 different systems that won't be a consideration of the
14 committee.

15 MR. CHEESMAN: Peter Cheesman, Public
16 Consulting Group. The section where it says no
17 alternate proposals.

18 MR. REDDITT: Yes.

19 MR. CHEESMAN: Does that, would that include
20 not submitting any recommendations for enhancing the
21 service based on the scope of work?

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1 MR. REDDITT: What we mean when we talk about
2 alternate proposals is we don't want offerors to
3 propose two solutions for one functional area.

4 MR. CHEESMAN: Thank you. That makes sense.
5 Does the bureau currently access any public records or
6 other data sources to obtain any property or financial
7 asset information?

8 MS. JOHNSON: Yes. Limited. We can
9 actually search the Maryland tax. We go through the
10 Department of Taxation and Assessment. We can only
11 search just Maryland. We really can't get anything
12 else out of Maryland. Yeah. We have like Maryland
13 only.

14 MR. CHANG: There is one person that entered
15 the room in the middle of the presentation. Should we
16 have her identify her name for the record?

17 MR. REDDITT: Yes, please.

18 MS. SHEPHARD: God morning everyone. My name
19 is Mranda Shephard, and I am on behalf of Shephard and
20 Associates Financial Services, Incorporated.

21 MR. REDDITT: Great.

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1 MS. SHEPHARD: Thank you. Sorry for the
2 interruption.

3 MR. REDDITT: It's okay.

4 MR. CHEESMAN: What are the normal operating
5 hours for the help desk?

6 MS. JOHNSON: Our normal business hours are
7 from eight o'clock in the morning to around 7:30 in the
8 evening, and then Saturdays and Sundays. But the
9 normal -- we're just pretty much that time line. We
10 have overtime, but I would say our normal operating
11 hours are 8:30 to around 7:30.

12 MR. CHEESMAN: Monday through Friday or
13 Saturday as well?

14 MS. JOHNSON: Saturday there is -- it's not
15 -- well, let me back up. Normal operating hours --

16 MR. CHANG: Can I just ask for a point of
17 clarification?

18 MS. JOHNSON: Sure.

19 MR. CHANG: I understood the question to be
20 what hours is the vendor to provide, expected to
21 provide help desk services.

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1 MS. JOHNSON: Yes.

2 MR. CHANG: It is not a question about what
3 our business hours are. And if we do not know
4 specifically what hours we want the help desk to
5 operate I suggest we take it under advisement and
6 answer it in writing.

7 MS. JOHNSON: Okay.

8 MR. CHEESMAN: Is the State looking for any
9 predictive analytics or decisions for tools that would
10 essentially compare the data we find with the program
11 limits, help the eligibility workers make decisions.
12 So that might include things like flags. I'm not sure
13 how -- I don't know if you want all this on the record.
14 But just to explain a little bit. So when a request
15 comes in the vendor would know what kind of program
16 that person is applying for. We would know from you
17 what the program limits are. We would know from policy
18 what the excluded account types are, what are not
19 excluded account types. So we would have all this
20 policy information and we can match that policy
21 information against the results, and we could save

1 workers time by essentially showing them "X" plus "Y"
2 equals "Z" and here is why. So I guess my question is,
3 is the State interested in any decisions or tools
4 within the proposed solution?

5 MR. CHANG: Should we take that under
6 advisement?

7 MS. JOHNSON: Yeah.

8 MR. CHEESMAN: Okay.

9 MR. REDDITT: And if there are any questions
10 that are asked here that we don't respond to, we'll put
11 that response in writing. It will be published on
12 eMaryland Marketplace on the DHR website.

13 MR. CHEESMAN: Are there any requirements for
14 a system to have been previously or a -- for the system
15 you intend to procure to have been previously used and
16 proven in other states?

17 MS. JOHNSON: No.

18 MR. CHANG: There is no requirement that it
19 was previously used.

20 MR. CHEESMAN: Okay. Bear with me just one
21 minute. Public consulting Group has more than 10,000

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1 prior contracts with state agencies. Do you want a
2 list of all 10,000?

3 MR. REDDITT: These are only for the State of
4 Maryland.

5 MR. CHEESMAN: Oh.

6 MR. REDDITT: Yes.

7 MR. CHEESMAN: Thank you.

8 MR. CHANG: Specifically referring to the
9 section that talks about state contracts.

10 MR. CHEESMAN: Great. Oh, I see. Thank you.

11 MR. REDDITT: Uh-huh.

12 MR. CHEESMAN: Under 3.25, technical
13 requirements for applications in both functional areas,
14 section "E," auditing. The audit trail shall include
15 type of event. Can you elaborate on "type of event?"

16 MS. JOHNSON: Three point two five.

17 MR. CHEESMAN: Section "E."

18 MR. REDDITT: We'll take that question down
19 and provide a written response.

20 MR. CHEESMAN: Okay. Thank you. Is the State
21 interested in proposals which include recommendations

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1 for additional data besides property and asset data?
2 Additional data that could be used for help in the
3 eligibility and decision making process?

4 MS. JOHNSON: Do we want to take that --

5 MR. CHANG: If the question is would the
6 State in the context of this proposal accept
7 recommendation that attach an additional cost for
8 additional sources of data, that I believe would be
9 considered to be an alternative proposal and would not
10 be accepted. If it is a recommendation of -- or if it
11 is an assertion that additional data can be provided as
12 part of the proposal, not necessarily responsive to
13 your requirement, does not respond to your requirement,
14 I don't know what the program --

15 MR. CHEESMAN: I'm thinking of some federal
16 and State data sources that are available at almost no
17 charge. That's where that question is coming from.

18 MS. JOHNSON: At no charge?

19 MR. CHEESMAN: Limited charge. Could be
20 provided to the State at no charge.

21 MR. CHANG: If they augment the requirements

1 that are stated in the RFP, then they would be
2 considered under those requirements if it's an
3 elaboration in those sections.

4 MR. CHEESMAN: And as a follow up to that.
5 Would the State consider -- because some of these
6 federal and State data sources require an agency to
7 essentially authorize the contractor to access those
8 sources would the State consider authorizing the
9 contractor to add additional, for example, property
10 records through a federal data source?

11 MR. CHANG: Let us take that under
12 advisement to consider --

13 MR. CHEESMAN: Okay.

14 MR. CHANG: -- the State's policy on that
15 question.

16 MR. CHEESMAN: Okay. Thank you. One thing
17 I didn't hear mentioned was the -- actually, I retract
18 that statement. I don't recall, but there are DBE VBE
19 requirements for this. That's all I have.

20 MS. JOHNSON: No what requirements?

21 MR. CHEESMAN: DBE/VSBE.

1 MS. JOHNSON: Oh. No. There are no MBE
2 subcontractor or VSBE subcontracting requirements.

3 MR. CHEESMAN: That's all I have.

4 MS. JOHNSON: Do you have any?

5 MS. SHEPHERD: No. I'm just here to
6 introduce myself.

7 MR. REDDITT: Well, if there are no other
8 questions let me just remind everyone that proposals,
9 again, are due by 3:00 p.m., Monday, September 19,
10 2016. Please make sure that the proposals arrive prior
11 to that due date and time. Make sure that your
12 proposals when you submit it, that you identify which
13 functional areas that you're proposing for on the
14 outside of your package. If there are no other
15 questions, then this concludes this proposal
16 conference. Thank you.

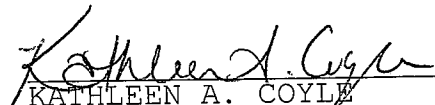
17 (Whereupon, at 10:22 a.m., the meeting
18 was adjourned.)

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CERTIFICATE OF NOTARY

I, KATHLEEN A. COYLE, the officer before whom the foregoing testimony was taken, do hereby certify that the witness whose testimony appears in the foregoing transcript was duly sworn by me; that the testimony of said witness was taken by me by stenomask means and thereafter reduced to typewriting by me or under my direction; that said testimony is a true record of the testimony given by said witness; that I am neither counsel for, related to, nor employed by any of the parties to the action in which this testimony is taken; and, further, that I am not a relative or employee of any attorney or counsel employed by the parties hereto, nor financially or otherwise interested in the outcome of the action.

This certification is expressly withdrawn and denied upon the disassembly or photocopying of the foregoing transcript of the proceedings or any part thereof, including exhibits, unless said disassembly or photocopying is done by the undersigned court reporter and/or under the auspices of Hunt Reporting Company, and the signature and original seal is attached thereto.


KATHLEEN A. COYLE
Notary Public in and for
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My Commission Expires:
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