MARYLAND DEPARTMENT OF HUMAN SERVICES
PRE-PROPOSAL CONFERENCE

SOLICITATION NO. FIA/AVS-20-001-S

ASSET VERIFICATION SYSTEM SERVICES

311 West Saratoga Street
Baltimore, Maryland 21201

Wednesday, September 23, 2020

9:31 a.m. to 10:34 a.m.

PRESENT FROM DHS:

DANNY A. GULLEY, Procurement Officer

ATTENDEES:

GLENN PRAGER, Covent Bridge
RICHARD BAUDIN, Covent Bridge
JASON ZURN, Covent Bridge
MURIEL TINKLER, Muriel Tinkler
JOANN TINKLER, Muriel Tinkler
PETER CHEESMAN, Public Consulting Group, Inc.
KALEN SUMMERS, Public Consulting Group, Inc.
MICHAEL SASKO, Softheon, Inc.
AKSHAY PUNDE, Softheon, Inc.
ROBERT STEWART, Softheon, Inc.
HUBERT CHAN, OAG-DHS
RICK GLASSBAND, OAG-DHS
LA SHERA AYALA, Family Investment Administration
JOANNE MASON, Family Investment Administration
CHRISTY MILLER, Family Investment Administration
ROB STARKEY, Family Investment Administration
KESHA SHAW, Family Investment Administration
KENNETH JESSUP, Hiring Agreement
SANG KANG, Procurement Division
DEBORAH AUSTIN, Procurement Division

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ATTENDEES (CONT'D):

SAM EDUFUL, Procurement Division
HENRY THORSTRATEN, Procurement Division

REPORTED BY: CAROL O'BROCKI, Notary Public

P R O C E E D I N G S

MR. GULLEY: Thank you. Good morning everybody. I'm Danny A. Gulley. You are all welcome to our pre-proposal conference for the Asset Verification System Services. I, along with other individuals, we will present information on the Request for Proposals that were issued by DHS on August 10th, 2020 for Asset Verification System Services, FIA/AVS-20-001-S.

We will try to answer as many questions as possible today concerning this RFP, but we want to emphasize that questions asked here during this meeting can also be submitted later in writing.

This meeting is being video recorded and audio recorded. The meeting is also been transcribed by court reporters. If you are speaking or asking questions, please try to be audible and state your name and the name of your company for the record. A transcript of this conference will be made available on eMaryland Marketplace Advantage and added also to the DHS website.

Everyone should please mute themselves while I do a roll call. You can unmute yourself just to affirm your presence. Please mute yourself again after doing that. I will begin with our potential Offerors, DHS staff in the sequence of the AAG, FIA, Hiring Agreement and Procurement.

Please also note that you can use the chat function on the right-hand side of your screen for those using the Google Meet link to ask a written question or to draw my attention to verbally speak.

I will begin the roll call; and beginning again with my own potential Offerors in the sequence of -- I will do it alphabetically. Starting with Covent Bridge, Glenn Prager. Glenn Prager. The next person is Richard Baudin. Jason Zurn. The next potential Offeror is Linder & Company International. Phillip Linder, Kimberly Rick. The next potential Offeror is Muriel Tinkler.

MS. M. TINKLER: Present.

MR. GULLEY: Joann Tinkler.

MS. J. TINKLER: Present.

MR. GULLEY: The next potential Offeror is Public Consulting Group and they are being represented by Peter Cheesman. Number two is Kalen Summers.

MR. SUMMERS: Present. Present.

MR. GULLEY: The next -- thank you. The next potential Offeror is Softheon, Incorporated. They are being represented by Michael Sasko, Akshay Punde, Robert Stewart. Now I will go to DHS staff beginning with Office of the Assistant Attorney General. We have Hubert Chan.

MR. CHAN: Yes, I am here. Thank you.

MR. GULLEY: Rick Glassband.

MR. GLASSBAND: Good morning. Yes, hi. Hi, there.

MR. GULLEY: We will go to the Family Investment Administration/MD Think-DHS. La Shera Ayala.

MS. AYALA: Good morning. I'm here.

MR. GULLEY: Number two is Joanne Mason.

MS. MASON: Good morning. Joanne is here. Thank you.

MR. GULLEY: Number three is Christy Miller.

MS. MILLER: Good morning. Christy's here.

MR. GULLEY: Thank you. Number four is Rob Starkey.

MR. STARKEY: Good morning.

MR. GULLEY: Number five is Kesha Shaw.

MS. SHAW: Good morning.

MR. GULLEY: We'll go to Hiring Agreement. Kenneth Jessup.

MR. JESSUP: Good morning. I'm here, Danny.

MR. GULLEY: All right. Thank you. And lastly, our Procurement Division, Sang Kang.

MR. KANG: Here. I'm here, thanks.

MR. GULLEY: Deborah Austin?

MS. AUSTIN: Good morning.

MR. GULLEY: Rufus Berry? Henry Thorstraten?

MR. THORSTRATEN: Good morning. Thank you.

MR. GULLEY: If you are on the call and you were not mentioned, I'm sorry. Can you please like unmute yourself and state where you're from, which entity you are representing?

MS. MCGARRY: This is Celia McGarry and I'm with Briljent, LLC.

MR. GULLEY: Thank you. Is there another person?

MR. EDUFUL: I'm here. Eduful, DHS Procurement.

MR. GULLEY: Thank you, so much. So I presume that's all. Okay. Thank you very much for that.

We will now go to introduction -- I mean, a brief remark from the Family Investment Administration considering that they are the custodian of this procurement and we will now ask the acting assistant -- the acting executive director, Ms. La Shera Ayala, to give us a few statements.

MS. AYALA: Good morning.

MR. GULLEY: La Shera, the floor is all yours.

MS. AYALA: Okay. Good morning. Thank you Danny, and good morning all again. We want to thank you all for joining us on behalf of the Family

Investment Administration at the Department of Human Services. Thank you to the potential vendors again or submitting your interest and joining us for today's session.

To give you a brief background of the Family Investment Administration within the Department of Human Services, we are the public assistance serving administration within DHS, so there are a number of public assistance programs by which we effectuate and determine eligibility for our customers in Maryland which includes our Medicaid program.

Specifically, as we are reviewing for today, Asset Verification Services, that will be in the realm of our Medicaid program. Currently, we do utilize AVS as it is required by the Centers for Medicaid and Medicare Services for our long-term care Medicaid program, and we will soon be expanding, again per CMS requirement, to also include a digital Medicaid program.

In order to utilize AVS, for us to have it, again, as I mentioned, it is very critical for us to have as we determine eligibility for our customers in Maryland. So as I close out with these opening remarks, again, I do want to thank you for your time and effort during this proposal. Thank you. Back to you, Danny.

MR. GULLEY: Thank you, La Shera. So I just want to mention that the essence of this process of the pre-proposal conference is to go through the RFP or the Request for Proposal section-by-section, beginning with Section 1 up to Section 6. We will skip Section 1 because there are no minimal qualification requirements for this RFP.

So with that being said, we will now go to Section 2 and Section 3 which will be presented simultaneously by both Rob Starkey who is the Technical Integration Manager and Kesha Shaw who is the State Project Manner for this AVS. Kesha and Rob, the floor is all yours.

MS. SHAW: Good morning everyone. Danny, do you want folks to hold their questions until the end or --

MR. GULLEY: Yes.
MS. SHAW: -- should (indiscernible).
MR. GULLEY: Yeah, so if you looked at the agenda that has been presented, there are like two sessions of questions and answer. After the presentation of Section 2 and Section 3, the floor will be open for questions.
And after that, we will present Section 4, 5 and 6, and then the floor will be open for another round of questions and answers. So please hold your questions after the presentation of Section 2 and 3. In the meanwhile, you can use the chat function. For those of you using the Google Meet, you can use the chat function to put in your question or you could also use that to raise your hand. Thank you so very much for that question, Kesha.
MS. SHAW: No problem. I'm going to cover a very high-level overview of the RFP. The Department of Human Services as well as the Maryland Department of Health determine Medicaid eligibility for State of Maryland, MAGI and non-MAGI customers.

As La Shera identified, we are mandated by the Centers for Medicare and Medicaid as well as the Social Security Act to obtain electronically verification of assets of recipients as well as applicants. In doing so, the state of Maryland has released a RFP that you guys are all potential bidders for to obtain financial assets as well as real property assets up to 60 consecutive months for applicants and recipients of its Medicaid program.

The state of Maryland intends to submit a electronic batch file on a daily basis to the vendor with responses being received on a daily basis as well. The Functional Area for -- Functional Area 1; Financial Institutions, the State is looking to obtain account numbers, balances as of the first of the month for the applicant, the recipient, as well as the spouse or any other responsible individual that is identified.

For Functional Area 2, the State is seeking to obtain verification of any real property owned by the applicant, or recipient, or the spouse, or other responsible party within a 60-month look-back period or as identified in the Parameter Data Element Agreement.

The state of Maryland is also looking to receive on a monthly basis various reports to identify trends that have occurred in the data for the applicants, recipients, and the responsible parties as well as timeliness, user usage of the system, and a monthly invoice for transactions that were -- for billable transactions.

Give me one second. If for any reason a financial institution is unable to provide a response for a submitted request, the state of Maryland is requesting information regarding why a match was not available. The state of Maryland is also seeking with the financial real property portion, Area 1, the capability to be able to identify known financial institutions for applicants, recipients and/or responsible parties.

That is the gist of the scope of work for this particular RFP. Danny, would you like me to cover any additional sections, or is it okay to move Section 3?

MR. GULLEY: It's okay, Kesha.

MS. SHAW: Huh?

MR. GULLEY: It's okay. Rob -- there are additional -- but it's okay unless maybe Rob has like additional issues to talk about.

MR. STARKEY: And good morning all. For Section 2; no, I think Kesha gave a good high-level overview.

MR. GULLEY: Okay.

MS. SHAW: Rob, I turn the floor over to you.

MR. STARKEY: All right. Good morning all. I will cover a few of the key details in Section 3 of the RFP. Most of -- a lot of the start of this section is around how we look to begin this project in terms of logistically with the kickoff meeting, requesting that the vendor bring to that meeting really two key pieces. First of all, a technical design document starting to propose the data elements and the technical mechanism.

We are looking for vendors to propose how the technical integration will work and bring that to the kickoff along with a proposed project schedule. In addition to that, there's details around the end of the contract and a lot of details around the invoicing. Our intent is that the invoices outlined in Section 3 virtually correspond and allow us to validate the reports that are mentioned in another section.

This section also contains a lot of details around disaster recovery and security, and also in terms of how security incidents are to be reported. Most of the security is in alignment with the state of Maryland's Department of Information Technology standards which are referenced in the RFP.

There is in Section 3.8 what we call a "problem escalation procedure" that is a key deliverable from the contractor as part of the -- this RFP and project initiation. And what we're looking for is how the vendor will notify the State of the existence of any type of problems or defects preventing successful -- essentially requests and responses from flowing through the system and how that process will be through resolution.

We are requiring as part of this, that there is a SOC 2 Type II audit, so the security requirements are there that need to be furnished.

And lastly, the only key personnel that we have called out in the RFP is the project manager that we're requiring three -- at least three years of experience in similar type of projects. There's a lot of details on this key personnel, et cetera, but we are looking for that -- for that person and potentially to work directly with us on the state-side through the technical implementation, and so there's a lot of details about substitution and changes of that key person who would really be the point person, from our perspective, through this project.

All right. That's everything I have as far as an overview for Section 3. Danny, back to you.

MR. GULLEY: Thank you Rob and Kesha. So the floor is now being opened for any questions pertaining to those presentations that were made by Rob and Kesha. As I mentioned earlier, you can use the chat function to -- on Google Meet to either ask a question or to raise your hand to speak, and that information is for our potential Offerors.

UNIDENTIFIED SPEAKER: I will -- no questions.

UNIDENTIFIED SPEAKER: Do you have any questions?

MR. GULLEY: Hello?

UNIDENTIFIED SPEAKER: I have none at this time.

MR. GULLEY: Okay. So are we all okay with the presentations with Section 2 and 3? Okay.   So with that being said, we will move to Section 4, 5, and 6. Section 4 is the proposal format, and we want to highlight again that all potential Offerors need to be registered with the eMaryland Marketplace Advantage. If you want to know what link to use, you can see that in -- at Section 4.2.

So in terms of -- I will try as much as possible to be fast with these sections, but after I will presume that you have already read those sections. So if you have like any questions, you can always make mention of that or -- in the chat or also call my attention to that.

So there are two batches of questions concerning this solicitation that have been received so far. Responses to the first batch of questions were published on DHS website and eMMA on August 20th, 2020. The second batch of questions and responses will be published two days after this pre-proposal conference.

However, if you have any questions today concerning this and concerning the solicitation, you can ask them orally or later send them to me by email. We will make it a point to answer all questions. Know that all questions and responses will be published on eMMA and the DHS website.

Section 4.5; the Proposal Due or Closing Date and Time. Proposals are due on Friday, 13 November 2020 at 4:30 p.m. Eastern Daylight Time. I will provide further details on this information later and the importance of following the submission procedures in the RFP.

If the proposals are late, they will be deemed late and not accepted. And please note that DHS will accept only paper proposals mailed or hand-delivered to the Procurement Officer.

Financial proposals shall be sent by mail or hand-delivered and must be received by the Procurement Officer by the due date and time in order to be considered. Proposals may not be submitted by email, or facsimile.

4.6, Multiple or Alternate Proposals. Multiple or alternate proposals will not be accepted. Submitting a proposal for one or both Functional Areas is not considered a multiple proposal so long as the Offeror follows the submission instructions. Please note that Offeror can decide to submit a proposal to provide services for only Functional Area I, that is verification of assets held by financial institutions, or Functional Area II, verification of real property. Or they can also decide to submit a proposal to provide services for both Functional Areas. Each Functional Area, that is I and II, must be submitted in separate technical and financial proposals.

4.7, Economy of Preparation. Proposals

should be prepared simply and economically. This should be straightforward and concise.

4.9, Award Basis. This is an RFP so all proposals will be ranked technically and financially for each Functional Area. An overall ranking for each Functional Area will be done thereafter. Although the Department intends to make one award in each Functional Area, the Department reserves the right to make one award to an Offeror that proposes to provide services in both Functional Areas.

4.10, Oral Presentations. We may have oral presentations. Oral presentations will be considered part of the technical proposal. Procurement Officer -- the Procurement Officer will notify Offerors of the time and place of oral representations.

Revision of the RFP. If there are any revisions to the RFP or addenda such as Questions and Responses, the Procurement Officer will post them to eMMA and the DHS website. Addenda are important. So far, I have not posted any. The Department has only posted the first set of questions and responses document. So please be on the lookout for any new addenda to the RFP.

The Question and Response document was also directly sent to a list of vendors. So if you would like to be on that list, please contact me with your email address and I will add you to the list. That way, you should receive any further addenda to the RFP.

Acknowledgement of the receipt of all addenda to this RFP issued before the proposal due date shall be included in the Transmittal Letter accompanying the Offerors Technical Proposal.

4.17, Acceptance of Terms and Conditions. By submitting a proposal in response to this RFP, the Offeror, if accepted for award, shall be deemed to have accepted the terms and conditions of this RFP and the Contract which is attached as Attachment M to the RFP. Any exceptions to this RFP or the Contract shall be clearly identified in the Executive Summary of the Technical Proposal.

4.18, Proposal Affidavit. Please submit a Proposal Affidavit with your proposal.

Verification of Registration and Tax Payment, which is 4.21. You must register with the State Department of Assessments and Taxation, SDAT. It is strongly recommended that any potential Offeror complete registration prior to the proposal due date and time.

4.26, MBE Participation Goal. There is no MBE participation goal for this contract. VSBE goal; there is also no VSBE participation goal for this contract.

Okay. I will now turn the floor over to my colleague, Henry Thorstraten, to present on the living wage requirement. Henry, are you there?

MR. THORSTRATEN: I am. Good morning.

MR. GULLEY: All right.

MR. THORSTRATEN: I'll discuss Maryland's Living Wage law. I'll be sharing information with you regarding this. It's been effective since October 1st, 2007.

The Maryland Living Wage law establishes and enforces wage standards for workers from private businesses receiving contracts or subsidies from local governments. Maintenance services and information technology services contractors are included among those required to adhere to these minimum hourly rates. An individual working full-time on a State project valued at $100,000 or more, if the contractor has more than 10 employees, or $500,000 if the employer has 10 or fewer employees, is subject to this law which is under Title 18 of the State Finance and Procurement Article, the Annotated Code of Maryland.

The Maryland Living Wage law is $14.42 per hour effective September 28th, 2020 if 50 percent or more of the total value of the State contract is performed in the Tier 1 area. If 50 percent or more of the total State contract value is performed in the Tier 2 area, then $10.83 per hour is paid effective September 28th.

The specific Living Wage rate is determined by whether the majority of the services they place in the Tier 1 or Tier 2 areas of the State. The Tier 1 area includes Baltimore City and Anne Arundel, Baltimore, Howard, Montgomery and Prince George's counties. The Tier 2 area includes any county in the State not included in the Tier 1 area.

If your business is operations and areas with two different wage tiers, the wage you pay is determined by the area in which 50 percent or more of the contract value is performed. If the employees who perform the services are not located in either Tier 1 or Tier 2, the living wage rate will be based upon where the majority of the recipients of the services are located.

Additional information regarding Maryland'S Living Wage requirement is contained in Attachment F of the RFP, which is entitled Affidavit Agreement, Maryland Living Wage Requirements for Service Contracts. Maryland Living Wage law is administered by the Maryland Department of Labor. Additional Living Wage information pertaining to reporting applications may be found by going to the Maryland State Department of Labor's website at www.dllr.state.Maryland.US and then clicking on Wage and Hour information under quick links and then Living Wage under DLI offices. The Living Wage rates are subject to an annual adjustment by the Department of Labor. However, your prices under the Contract may not change because of any Living Wage adjustments. Are there any questions regarding Maryland's Living Wage law?

MR. GULLEY: Hello? Okay. Thanks, Henry. I guess that is about it about the Living Wage. So we will now move to Section 4.29 which is the Federal Funding Acknowledgment. There's a federal component -- a federal funding component of this Contract, so potential Offerors will have to fill in Attachment G of the RFP.

So 4.30, Conflict of Interest Affidavit and Disclosure. Please also submit a Conflict of Interest Affidavit and Disclosure and submit with your proposal. That is in Attachment H or is labeled Attachment H of the RFP.

Non-Disclosure Agreement, 4.31. A Non-Disclosure Agreement is not required for this procurement as an Offeror, but is -- a Non-Disclosure

Agreement is required being a contractor. So please try to identify the difference. And if you're a contractor, the Non-Disclosure Agreement labeled as Attachment R, you will have a Non-Disclosure Agreement labeled Attachment R. You will have to like fill that in when you are notified of the potential contract award.

4.32, HIPAA. HIPAA is not required. The Health Insurance Portability and Accountability Act Business Associate Agreement is not required for this procurement.

Nonvisual Access, 4.33. This solicitation does not contain IP provisions requiring Nonvisual Access.

4.34 is not applicable.

4.35, Offeror is not required to complete the Location of the Performance of Services Disclosure.

4.36, the Department of Human Services Hiring Agreement. I will give that to my colleague and friend, Kenneth Jessup, to present on that, to expatiate more, or to provide us more information on the DHS Hiring Agreement. Kenneth?

MR. JESSUP: Good morning everyone. I'm going to be really brief with this. Some of you have a lot of other things you need to discuss. I'm going to share my screen real quick with you.

So the Hiring Program, the purpose of it is to encourage the use of Hiring Agreements as a mechanism for providing current and former Family Investment recipients with employment opportunities who seek procurement contracts.

Basically, we like the opportunity to apply and interview for a position, if we're qualified, and we'll do the screening process for you. The only thing that we ask is that if you have any positions that come up during the life of the Contract, that you allow us to have individuals to interview for the position and we'll do the screening to make sure that they match up with the job requirements that you ask for and hopefully we can get some good matches out of that.

In addition to that though, one of the key areas for you would be that if you hire anyone out of our target population group, would allow you to be able to qualify to see if you can receive tax benefits from the Department of Labor by hiring out of targeted populations.

We have TANF recipients, which is Temporary Assistance to Needy Families, we have non-custodial parents that work with child support, and we have foster kids that are graduating from the system and we do our best to make sure that we can train them, prepare them and have them ready for positions that are coming available.

So as long as we can get your job description and the notification that a position is coming out, we'll do everything in our power to make sure that we'll send you qualified candidates to interview and if they -- if it turns out that they're a good fit and they meet your qualifications, that you hire them. That's about the beginning and the end of it.

The criteria for Hiring Agreement is that the Contract is -- the contract life is valid for two years or longer, valued at $200,000 or greater, and that the contract produces jobs for the life of the contract which includes subcontractors.

If you have any questions or concerns about the Hiring Agreement program, you can always reach out to me, Kenneth.Jessup@maryland.gov, or Hiring.agreements@maryland.gov. We're also listed on the BPW website under Hiring Agreement Advisory. Are there any questions?

MR. GULLEY: Thank you, Kenneth. So we are going to move to the next section which is the Small Business Reserve Procurement. This is not a -- this solicitation is not designated as a Small Business Reserve Procurement, and so we are now on -- that will be about it for Section 4.

So we will now move the Section 5 which talks about the proposal format.

5.1, this is a two-part submission proposal format. As I have discussed earlier, proposal submission will be in two parts, the technical and the financial.

An Offeror proposing to provide services in both Functional Areas identified in this RFP shall submit a technical proposal and financial proposal for of Functional Area I, that is verification of assets held by financial institutions; and Functional Area II, verification of real property assets.

Section 5.1.1, in terms of the volume, Volume I, the Technical Proposal. It is required that Technical Proposal be submitted via mail in paper format or hand-delivered to the Procurement Officer.

In Volume II, the financial proposal also is to be sent by mail or hand-delivered to the Procurement Officer.

Unless the resulting package will be too unwieldy, the third preference is for the separately sealed Technical and Financial Proposals to be submitted together in a single package to the Procurement Officer.

So if you are a potential Offeror, if you are submitting a Technical Proposal for Functional Area I, it should be a separate Technical proposal for Functional Area and a separate Financial proposal for

Functional Area I. And for Functional Area II, it should be separate Technical Proposal and separate Financial Proposal and put it in a single package addressed to the Procurement Officer of DHS.

Unless it is too unwieldy or too bulky, then you can separate it, but clearly identify that the entity for which you are submitting the proposal on behalf of -- clearly identify your entity.

5.2, Proposal Delivery and Packaging. Proposals, the Technical and Financial shall be -- it shall be delivered by 5:00 -- sorry. Proposals will not be -- a proposal will not -- submission by email will not be considered. Please take that into consideration, or please remember that email submission will not be considered. Please, also, do not provide any financial or pricing information in your Technical proposal. Please, please do not do that.

Volume I, the Technical Proposal. One -- so it consists of (indiscernible). If you have like one original executed Technical Proposal and all supporting material marked and sealed, it should also have four duplicate copies separately marked and sealed. You should also have one electronic version of the Technical Proposal in Microsoft Word format version, 2007 or greater.

And, also, you should have two electronic versions of the Technical Proposal in a searchable Adobe PDF format including a redacted version and a second electronic with a claim of confidentiality and proprietor information redacted. So you should have a redacted and an unredacted version basically.

Volume II, the Financial Proposal consisting of one original -- you should have one executed Financial Proposal and all supporting material marked and sealed. You should also have four duplicate copies of the above separately marked and sealed, and you should also have one electronic version of the Financial Proposal in searchable Adobe PDF format. Again, please omit all pricing information from your Technical Proposal. We can't emphasize that more.

So we will move when -- 5.3.1. When you are preparing your Technical Proposal, please refer or respond to section-by-section of the Scope of Work because we will have evaluated looking at your proposal and we want to understand whether you understand the scope of work by section and whether you're actually responding to the Scope of Work.

We don't want Offerors, or potential Offerors, who didn't comply, or are comply, or agree. We want you want you to respond as to the Scope of Work in terms of the methodology. How do you intend on performing your services? So please try as much as possible to do that.

Please note that the Technical Proposal will also need to be broken down into tabs. For Tab A, if you have the Title Page and the Table of Contents, Tab A-1 should also contain any confidentiality of proprietary information. So if you have a proprietary, a confidentiality -- confidential information, you should please state the section or sections under which the confidential information is located and why are they confidential under Tab A -- Tab A-1, sorry, Confidential Proprietary Information. And that should come after the Title Page and before the Table of Contents.

So under Tab B, you should also have your Transmittal Letter. Please remember to acknowledge all receive of addenda under the Tab B there. Acknowledgment of addenda is always done in your Transmittal Letter, which is located under Tab B of your proposal.

So we'll move to Tab C which is the Executive Summary. You should clearly state which Functional Areas or Functional Area you are submitting proposal for under the Executive Summary. And also, you should also -- any exceptions -- if you have any exceptions with the Contract, if you also state that in your Executive Summary. If you have any exceptions to the Scope of Work, you should also state that in your Executive Summary.

Tab D is to be left blank because that is where the minimum qualification should be located, but there are no minimum qualifications for this RFP so it should be left blank.

So your next section is TAB E and that is basically the entire meat or the substance of your proposal. That's where you will practically respond to the work plan methodology as to how you intend on procuring DHS or meeting DHS service requirements.

So you should clearly be descriptive as to how that the Scope of Work will be our -- as to how DHS requirements -- as to how you intend on meeting the requirements for the Scope of Work. You should give a definitive section-by-section description of the proposed plan to meet the requirements and you should include specific methodology techniques; the number of staff to to be used.

And also, if applicable, you should -- yeah, Rob clearly mentioned that there's only like only -- only -- the required person for this contract is the project manager. So they only require like a single -- there aren't like number of more listing of staff required, so you should also take that into consideration.

You should also consider that for each

Functional Area, the Offeror should describe the breadth or the scope of sources that will be utilized in generating the electronically verified asset data or information. For each Functional Area, too, the Offeror should describe the proposed methodology.

For each Functional Area, the Offeror should describe the proposed methodology for searching the assets including the -- including whether a search will be limited or focused on a specific geographic area. So the Offeror should also be specific and describe as to the length of time that will be required in providing the information.

All of that should be clearly stated on your response to the Technical -- I mean, your Technical -- your response to the Technical requirements.

So the Offeror should also describe the established data disaster recovery and security model. That should considered.

Also, the Contract Initiation Plan should also be taken into consideration. You should propose a contract initiation plan. How do you intend on accomplishing or meeting a contract initiation period? Because there's a specific number of months that are required by the contract initiation plan. You should also take that into consideration.

You should also prepare -- there should also be a submission of a draft Problem Escalation Procedure, the PEP, when you are responding to this section. That should include, at a minimum, titles of individuals that will be contacted by the State Project Manager should there be a problem.

Also, we will now move to -- that basically covers TAB E of the -- when you are responding to the Technical requirements. So after that, we will move to the Tab F which talks about the experience and the qualifications of proposed staff.

Please provide your Staffing Plan and additional resources that should be acquired to meet the needs of the Department. Describe in detail how the proposed staff's experience and qualifications relate to their specific responsibilities.

As Rob earlier mentioned, there's a key

personnel requirement. You need to state that under the proposed staff and also you need to propose -- you need to state any subcontractors who are to be assigned to the project if the Offeror is awarded the contract.

You may also have to provide your organizational chart outlining the personnel and their related duties. You should include the job titles and the percentage of time that will be allocated to the contract.

The next section will be Tab -- I mean, the next Tab will be Tab G which would speak to the Offeror's qualifications and capabilities. So you are to just list the number of years the Offeror has been providing similar goods or services, the number of clients and the geographic location these clients are located or the Offeror is currently serving. So that is just the gist of what should be under Tab G.

Under Tab H will basically list your references, and the number of references requires three references to attest to your abilities or capabilities to provide similar services that you're proposing.

Under Tab I, you have to list all of your current or prior State contracts. So if you have current contracts with the state of Maryland or other states, you have to list those contracts and if you -- have been completed within the last five years period.

Under Tab J, you are to provide your financial capabilities. That is you have to provide your -- preferably is your profit and loss statement and a balance sheet within the last two years. It should be independently audited. That is what is preferred by the State. And also -- that would that would be that for Tab J.

Under Tab K, is the Certificate of Insurance. You have to list -- there are specific requirements or insurance requirements that are located under Section 3.6 of the Proposal. You need to go back and look at those insurance requirements.

Under Tab L, you have to list all of your subcontractors who have been utilized for this contract.

Under Tab M, if you have any legal action, you have to provide a summary to the State if there are any -- currently any legal action or litigation the potential Offeror is involved with. You have to list -- you have to -- or involved in, you have to list that.

There's no Economic Benefit for this contract, so you have to leave Tab N as blank.

And under Tab O, you have to submit all of the required form attachments and one of which is the Bid Proposal Affidavit, the Living Wage. All of that is located under -- you should locate all of those attachments under Tab 0 of the Proposal.

So 5.4, the Volume -- Volume II. We just discussed the Technical Proposal. The Financial Proposal, if you -- it was listed as Attachment B to the RFP which Tab 1 consists of the instructions. Tab 2 is the Financial Asset Verification and Tab 3 is the Real Property Verification. It's an Excel sheet and it is labeled as Attachment B to the RFP.

6.1. So we are currently under Section 6 that talks about the evaluation process and establishment of an Evaluation Committee. 6.1, there will be an Evaluation Committee to evaluate proposals for this RFP.

6.2. The criteria to be used to evaluate each Technical Proposal are listed below in descending order of importance. The Technical Proposals submitted for each Functional Area will be ranked against other Technical Proposals submitted in that Functional Area.

So in order of importance, those items -- in order of descending -- I mean, in descending order the important -- items that will be rated are 6.21, the Offeror's Technical Response to Requirements and Work Plan. So if you want to have a clear detail of that, please look at 5.3.2.F of the RFP, and that is broken down into subpoints.

6.2.1.1, the Offeror's ability to provide services that maximize the overall benefits to the State.

6.2.1.2, the quality of the Offeror's Disaster Recovery and Security Plan.

6.2.1.3, the breadth of sources that an Offeror will utilize to determine the value of assets owned by an applicant or recipient.

6.2.1.4, any binding commitments by the Offeror to provide asset verification on an expedited timeline.

6.2.1.5, the quality of an Offeror's Contract Initiation Plan to integrate its services into the State's Eligibility and Enrollment System.

And 6.2.1.6, the Offeror's ability to provide timely and accurate reports to assist the State in monitoring contractor performance.

The next descending order of importance is 6.2.2, the Offeror's Qualifications and Capabilities including proposed subcontractor. If you want to look at that, you can look at the Section 5.3.2.H of the RFP.

The next item in order of descending importance is the Experience and Qualifications of proposed staff. See 5.3.2.G.

6.3, the Financial Proposal Evaluation Criteria. So all qualified Offerors will be ranked in each Functional Area from the lower, most advantageous, to the higher, the least advantageous price based on the Total Proposal Price within the stated guidelines set forth in this RFP and as submitted on Attachment B, which is the Financial Proposal Form.

6.5., the Selection Procedure.

6.5.1, the general selection procedure is that the contract will be awarded in accordance with the Competitive Sealed Proposals method found at COMAR 21.05.O3.

6.5.2, the Selection Process Sequence. The Technical Proposal will be evaluated for technical merit and ranked in each Functional Area. During this review, oral presentations and discussions may be held.

D, the Financial Proposal of each Qualified Offeror, a responsible Offeror determined to have submitted an acceptable proposal will be evaluated and ranked separately from the Technical evaluation in each Functional Area.

After a review of the Financial Proposal of Qualified Offerors, the Evaluation Committee or Procurement Officer may again conduct discussions to further evaluate the Offeror's entire proposal.

When in the best interest of the State, the Procurement Officer may permit Qualified Offerors to revise their initial proposal and submit in writing Best and Final Offers, BAFOs. The State may make an award without issuing a request for a BAFO or Best and Final Offers. Offerors may only perform limited substitutions of proposed personnel as allowed in Section 3.11.

6.5.3, Award Determination. Upon completion of the Technical Proposal and Financial Proposal evaluation and ranking, each Offeror will receive an overall ranking. In making this most advantageous Proposal determination, Technical Proposals -- sorry, Technical factors will receive equal weight to Financial factors.

So again, Technical factors will receive equal weight to Financial factors. The State reserves the right to award a single contract for both Functional Areas if a single Offeror has the Proposal determined to be the most advantageous to the State in each Functional Area.

So basically, that concludes our presentation of this RFP covering Sections 2, 5, and 6. Are there any questions or suggestions regarding this presentation?

UNIDENTIFIED SPEAKER: Not right now for me. Thank you.

MS. MCGARRY: I had one question. This is Celia from Briljent, LLC. I'm just wondering if you will be distributing the attendee list. It is a good way for companies that want to find partnerships to know who will be pursuing this opportunity, especially for small businesses that are trying to partner.

MR. GULLEY: Yes. Yes, we will definitely do that. We will definitely distribute the attendees list listing.

MS. MCGARRY: Great. Thank you so much. Very helpful.

UNIDENTIFIED SPEAKER: Is she an MBE? (Indiscernible) of course she's (indiscernible).

MR. GULLEY: Hello? Hello? Celia, are –

MS. MCGARRY: Yes?

MR. GULLEY: Are you an MBE?

MS. MCGARRY: We are a woman-owned firm.

UNIDENTIFIED SPEAKER: If you can think about it, there's a (indiscernible). She can state (indiscernible) business.

MR. GULLEY: So I'm being told that you can actually speak of your business if you want to.

MS. MCGARRY: Oh. Okay. Great. Briljent, LLC is a woman-owned firm. We've done business across the U.S. and in all Territories as well. We specialize in customized training and change management, project management as well as events and meeting coordination.

We've done a lot of work in Health and Human Services, a lot of work and eligibility in Medicaid. Our "sweet spot" is supporting large complex systems integration solutions and crafting an analysis of what constituents and State employees need to learn in order to embrace new solutions. And thank you for that opportunity.

MR. GULLEY: Thank you. You're most welcome.

Are there any questions from our potential Offerors?

MR. THORSTRATEN: This is Henry.

MR. GULLEY: Okay.

MR. THORSTRATEN: Performance part, in the chat section asked, will you be sharing the recording?

UNIDENTIFIED SPEAKER: We'll get back to you in writing on that question, but we're not sure if we're going to release the recording yet.

MS. MCGARRY: Okay. Thank you, very much.

MR. GULLEY: So I'm guessing too that we will publish the transcript, so --

UNIDENTIFIED SPEAKER: But not the video.

MR. GULLEY: -- and not -- I -- we don't know yet whether we're going to publish the video, but we will definitely get back to you on that.

MS. MCGARRY: Thank you. I appreciate that.

MR. GULLEY: So are there further questions or issues, comments?

UNIDENTIFIED SPEAKER: Will you give any other MBEs the opportunity to speak?

MR. GULLEY: Are there any other MBEs --

UNIDENTIFIED SPEAKER: Or DBEs.

MR. GULLEY: -- or DBEs that would want to speak?

(No response.)

MR. GULLEY: Okay. So that's about it. The meeting is adjourned at 10:34. Thank you so much again for participating in our pre-proposal conference.

Please do not forget the submission deadline is Friday, 13, November 2020 at 4:30 EDT. Four-thirty p.m., let me be specific about that. Okay, everybody. Have a great day.

UNIDENTIFIED SPEAKER: You unmuted yourself. Thank you.

MR. GULLEY: Yeah.

UNIDENTIFIED SPEAKER: Thank you.

MR. GULLEY: Okay.

UNIDENTIFIED SPEAKER: Thank you.

(Whereupon, the pre-bid conference was concluded.)

CERTIFICATE OF NOTARY

I, CAROL O'BROCKI, 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.

Carol D. O'Brocki

____
CAROL O'BROCKI,
Notary Public in and for
the State of Maryland

My Commission Expires:
1/15/23