STATE OF MARYLAND
DEPARTMENT OF HUMAN SERVICES
PRE-PROPOSAL CONFERENCE

REQUEST FOR PROPOSALS
DISABILITY BENEFITS ADVOCACY PROJECT
RFP NUMBER FIA/DBA-21-001-S

WEDNESDAY, APRIL 20, 2022
10:00 A.M.
(Remotely via Google Meet)

Maryland Department of Human Services
311 West Saratoga Street
Baltimore, Maryland 21201

PRESENT FROM MARYLAND DEPARTMENT OF HEALTH:

SANG KANG, Procurement Officer

JACQUELINE TURNER, Director
Office of Cash Programs

JACQUELINE A. STANTON, Deputy Director
Office of Cash Programs

JOANNE MASON, Director, Office of Administration

CHRISTY MILLER, Contracts Manager
Office of Administration

TAWANDA EPPS, Analyst

KENNETH JESSUP, Workforce Development Coordinator
Program Manager, Hiring Agreement

JESSICA HORTON, MBE Director/VSBE Liaison

RICK GLASSBAND, ESQ., Assistant Attorney General

VENDORS PRESENT:

JOSEPH CONLEY, SQN Systems
LOUIS BULLOCK, SQN Systems
K. ALEX KERR, Maximus
DAN BLITZ, Maximus
KESTON LEE, Maximus

REPORTED BY: DEBORAH B. GAUTHIER, Notary Public

P R O C E E D I N G S

MR. KANG: Good morning, everyone. It is ten o'clock. And welcome to the pre-proposal conference for Disability Benefits Advocacy Project. I'm going to give maybe a few more minutes for people to show up, but while we're doing that, could you please sign in the chat perhaps your name and just your company? It's for the attendee list. I'll be able to find your contact information elsewhere. All right. You guys can see the agenda, right?

UNIDENTIFIED SPEAKER: Yes.

MR. KANG: Thank you. All right. Is everyone putting their names in? Let's see here. Let me just take a quick look to see if everyone is here and we have representation from everybody.

(Brief pause.)

MR. KANG: Okay. I believe we can get started at this point. All right. So welcome again to the pre-proposal conference for Disability Benefits. My name is Sang Kang. I'm the Procurement Officer for this procurement, and I'll be presenting some -- we will be presenting some information about the Request for Proposals, and towards the end of the conference we'll try to answer any questions that you may have concerning the RFP.

If you haven't already done so, please just sign in the chat. That'll help us later. Please also note that Hunt Reporting is transcribing this pre-proposal conference, so when you are asking questions, if you can, could you please just state your name and the name of your company for the record. I'll try to remind you later. A transcript of this conference will be made available to you as an amendment to the RFP on eMaryland Marketplace and also the DHS website.

Okay. So let's begin the conference with introductions. I'm not sure exactly how we should do this. Just maybe we can go down the list here. Just state the name of your company, the name of your organization, and if you are an MBE or a VSBE company, please state -- you can give, like, a quick description of the type of services that you provide, so that everyone will know that information. So I will begin.

If everybody can see the -- if you can click on -- there's like -- there's a little thing that says, like, 20 people are here. Maybe we could just go down that list to introduce ourselves. I'm Sang Kang, and I am the Procurement Officer for this RFP. There's someone on 1509. Okay. Christy, you want to go?

MS. MILLER: Yes. Good morning, everyone. Christy Miller. I am a Contracts Manager with the Office of Administration. Good morning.

MR. KANG: Good morning. Mr. Blitz.

MR. BLITZ: Yeah. Hi. Dan Glitz from Maximus. Nice to meet all of you on this call and good morning.

MR. BULLOCK: Good morning. Louis Bullock with SQN Systems. We are a certified MBE and VSBE.

MR. KERR: This is Kenneth Kerr with Maximus. Good to see you.

MR. CONLEY: Joseph Conley, SQN Systems. We are a certified MBE and VSBE. Thank you.

MR. LEE: I'm Keston Lee, and I'm with Maximus.

THE REPORTER: I didn't hear that.

MR. LEE: Keston Lee with Maximus.

MR. KANG: Okay. Did -- maybe DHS members want to introduce yourselves? Maybe Jackie can start.

MS. TURNER: Good morning, everyone. My name is Jacqueline Turner. I am the Director for the Office of Cash Programs with the Department of Human Services. Welcome. Thank you.

MS. HORTON: Good morning, everyone. I'm Jessica Horton. I am the Minority Business Enterprise Director and the Veteran Small Business Enterprise Liaison.

MS. STANTON: Hello, everybody. I'm Jacqueline Stanton. I'm the Deputy Director of the Office of Cash Programs.

MS. MASON: Good morning, everyone. This is Joanne Mason. I'm the Director of the Office of Administration with the Department of Human Services. Thank you for joining.

MS. EPPS: Hi. Good morning, everyone. I'm Tawanda Epps, the older youth/teen analyst for the

Maryland Department of Human Services.

MR. JESSUP: Good morning, everyone. My name is Kenneth Jessup. I'm the Program Manager for the Hiring Agreement Program.

MR. KANG: Okay. Is that everyone? Rick, did you introduce yourself?

MR. GLASSBAND: Rick Glassband. I'm an Assistant Attorney General.

MR. KANG: Okay. All right. I think we got everyone. So let's see here, the opening remarks will be by Jacqueline Turner, Director of Cash Assistance Programs.

MS. TURNER: Good morning, everyone. Thank you, and thanks, Sang, for that introduction. But, yes, like I just said, my name is Jacqueline Turner. I'm the Director for the Office of Cash Programs at the Department of Human Services, Family Investment Administration. And I just want to thank each of you for taking the time to attend our pre-proposal conference for our Disability Benefits Advocacy Project.

DHS is the State's social services provider and Maryland's fourth largest agency. Its critical mission is to safeguard and provide services to Maryland's most vulnerable citizens. In performing this mission, DHS administers Maryland's public assistance programs through our Local Department of Social Services in 24 local jurisdictions throughout the State. The programs include but are not limited to temporary cash assistance, supplemental nutrition assistance programs, energy assistance, child support enforcement, and child welfare programs.

DHS is issuing this Request for Proposal in order to secure Social Security Administration Title II and Title XVI benefits in two Functional Areas. Functional Area I involves obtaining Title II and Title XVI benefits for children placed in foster care or recently emancipated youth up to the age of 23. Functional Area II involves obtaining Title II and Title XVI benefits for DHS's adult customers and Temporary Cash Assistance children. Title II Benefits are disability benefits to individuals who are insured under the Social Security Act by virtue of their contributions to the Social Security trust fund through the Social Security tax on their earnings, typically retirees, as well as to certain disabled dependents of insured individuals. Title XVI Benefits, also referred to as SSI benefits, are payments made by the federal government to individuals, including children under age 18, who are disabled and have limited income and resources. This work is critical to assisting our customers with navigating the Social Security Administration application process and insuring our customers receive benefits they are eligible for.

Again, I want to say welcome and thank you for attending our pre-proposal conference. So, Sang, I will turn it back over to you.

MR. KANG: Thank you, Jacqueline. Okay. So I will begin presenting Section 1 of the RFP at this point. Section 1 is just the minimum qualifications, and there are actually no minimum qualifications for this procurement, but there are preferred qualifications listed in Section 3.10. Can everyone here me okay?

(All participants indicate yes.)

MR. KANG: Okay. All right. Great. So, let's see here. In Section 3.10, the Preferred Offeror experience is having at least three years of experience completing and submitting SSI applications and experience with the Social Security Administration. And if -- so with -- you can give two letters of reference attesting to this experience as part of your Proposal to meet the preferred quals. So those are the minimum and preferred qualifications for the RFP. Now Jackie Stanton, Deputy Director of Cash Programs, will present Sections 2 and 3.

MS. STANTON: Hi. Good morning again, and, again, welcome. As you just heard Ms. Turner explain, that there are two Functional Areas to this RFP. So Area I deals with the foster children, so I'm going to let Tawanda Epps explain Area I, and then when she's done with Area I, then I will explain Functional Area 2 and Section 3. Tawanda.

MS. EPPS: Thank you, Jacqueline. Again,

Functional Area I is for the youths in foster care. No later than 15 calendar days after the Contract's start date, the Contract Monitor will electronically transmit to the Contractor via encrypted -- an encrypted e-mail -- excuse me -- a file containing personal identifiable information regarding each youth up to 23 years of age who has entered or left Maryland's foster care system, receives extended foster care services, or has had a change in placement and whom DHS has identified as potentially eligible for or currently receiving Title II or Title XVI benefits. In addition to the identifiable information, the file will include the date of the referral and the youth's Title IV-E eligibility status. The file will contain cases of youth who are -- it'll also contain cases of youth who are potentially eligible to apply for Title II or Title XVI benefits.

Now, the Contractor will be responsible for managing the benefit application, acquisition, and adjustment process for all children in the custody of the Local Department of Social Services. And those core functions include screening potentially eligible youth for Title II and Title XVI benefits; completing and filing Social Security applications; completing documentation from Social Security to insure ongoing eligibility; also continue disability reviews and nonmedical reviews; transitioning youth from childhood to adult SSI; executing Representative Payee changes; notifying the Social Security Administration of placement changes when the Social Security benefit is impacted; and completing the notification to the child's counsel for Title II and Title XVI benefits, whether they are approved or denied.

They will notify and inform the foster youth's case worker in the event the youth needs a consultive medical exam to complete the SSA application. So then they will complete and submit all required Continuing Disability Review (CDR) documentation to SSA in order to determine whether a youth meets adult disability requirements; provide monthly status updates on all applications committed to SSA -- I mean, submitted to SSA. Excuse me.

And also when the youth is exiting foster care, the Contractor will stop working on the case regardless of where they are in the application process, and the Contractor shall return all case-related documentation to the Local Department no later than seven calendar days after receiving notification that the youth has exited foster care. And these updates are to begin no later than 60 days after the application was submitted. Back to you, Jackie.

MS. STANTON: Okay. Thank you. So with the adult side, along with the foster children list that you will receive on the 15th of the month, you will also receive a second -- actually, two lists. One list will list the adult recipients of TDAP, PAA, and TCA. Then you will receive another list that would be for the TCA children. And both these lists will contain valuable information, and do keep in mind that these are potentially eligible recipients, but they're not receiving Title II or Title XVI benefits. The file will be encrypted and it will be in an Excel format.

When you receive the list, we are requesting the following. We're asking that you screen all individuals to determine if they, you know, are potentially eligible for Title II or Title XVI benefits and obtain any documentation from the recipient, and if you're dealing with a TCA child, you will have to contact the guardian of that child and get the documentation from the guardian. You can also request information from the medical provider that's relevant to making an application or an appeals case. We're also asking that you prepare and submit the Title II and/or Title XVI application on behalf of that individual. We're also asking, if SSA requests, that you help that customer obtain any additional medical information or evidence to supplement the application that SSA has requested.

If it's found out that you need more medical information or vocational information and the -- you're asking for the customer to get the examination performed, all requests to perform the independent medical examination, functional examination, vocational examination, and any other examination or reports that are not covered by Medicaid, you have to send that request to the Contract Monitor, and it will be at the sole discretion of the Contract Monitor to approve or deny the request. The Contract Monitor will have 15 days to render a decision, and if the request is approved, the Contractor shall cover the cost of the exam or the assessment.

Reporting requirements. This is for Area -- Functional Area I and II. We are asking that this report shall be in an Excel format and for -- and will be for Areas I and II, unless specifically said for a specific area. So we're asking you to please keep track of the number of referrals you receive from DHS; the number of new Title II and Title XVI applications initiated; the number of new Title II and Title XVI applications submitted to SSA; the rate of initiated applications that were submitted to SSA -- number submitted, number initiated -- the number of active Title II and Title XVI applications filed with SSA that have not received a decision; the average duration of active applications filed with SSA that have not received a decision; the number of active Title II or Title XVI applications filed with SSA at each stage of the appeals process, Reconsideration, Administrative Hearing, and Appeals Council; the average duration that the active Title II and Title XVI applications filed with SSA remain unresolved at each stage of the appeals process -- for example, 100 days is the average length of time spent in the reconsideration stage -- the number of Title II and Title XVI applications filed with SSA that receive a decision, and, of those, the number of approved and the number denied; the number of Title II or Title XVI reconsiderations filed with SSA that received a decision, and, of those, the number approved and the number denied; and the number of Title II and Title XVI appeals (Administrative Hearings level) with SSA that receives a decision, and, of those, the number approved and the number denied; the number of Title II and Title XVI Appeals Council filings with SSA that received a decision, and, of those, the number approved and the number denied; the average duration between the filing date and decision date for the Title II and Title XVI applications; the approval rate for applications, excluding those approved on reconsideration or appeal; the approval rate for reconsiderations and appeals; the overall approval rate, total approved and total filed.

And then we also would like for you to list the top five reasons applications were denied; the top five reasons reconsiderations or appeals were denied; and for Functional Area I only, the number of cases where DHS became the Representative Payee and the CINA attorney was notified; for Functional Area I only, the number of changes in SSA status due to placement changes; for Functional Area I only, the number of applications initiated for youth aging out of care prior to youth exit of care; and for Functional Area II only, the number of new referrals contacted and the response rate for those contacts. Okay. And that -- and this report will be sent monthly.

Okay. Also in the scope of work, we are also asking Vendors or Contractors to do outreach, training, and customer engagement services. And what we're asking is for you to implement outreach, training, and engagement services to target the individuals who are referred under the Functional Area I and II, because DHS would be sending a monthly list, who may be potentially eligible for federal SSA benefits and individuals who are not required to participate in the DBAP Program, but may need assistance in applying for federal SSA benefits. So we may have customers who are curious and, you know, you can provide them information.

The contractor should provide quarterly training to the LDSS staff about new developments and processes to the SSI application, denials and appeals process; create and distribute outreach flyers and brochures for local offices and community organizations; initiate applications and outreach to LDSS offices and SSA to begin the application process for youth aging out of care, where unable to complete advocacy before youth exits, and emancipated youth up to the age of 23. For the staffing requirement, we are asking that -- to provide an individual to serve as the

Contract Project Manager, and that person will be the chief point of contact during the entire term of the Contract.

The Project Manager's duties shall include overall oversight of the project operations, maintaining quality assurance, and providing input and recommendations regarding the Title II and Title XVI Benefit claiming process. We're also asking that the Vendor provide a specific -- significant number of staff qualified to satisfy the requirements of this RFP, including qualified staff to attend and provide appropriate representation in proceedings at all hearings and appeals.

This RFP also has performance measures. These performance measures will rate the success of the Contract. So the first performance measure is, you know, screening all the referrals received no later than 60 calendar days after receipt of the referral; complete and file an SSA Benefit application no later than 90 days after receipt of case referral; and complete and file an SSA change of placement and

Representative Payee change no later than 45 days after receipt of referral; submit 100 percent of all identified potentially eligible Foster Children applications; complete 100 percent of all Childhood to Adult benefit conversions; make personal contact with at least 85 percent of potentially eligible referred Functional Area II customers on the monthly list within 60 days; submit 100 percent of all identified potentially eligible customers' application within 90 days, and that's Functional Area II; and then submit 100 percent of all identified potentially eligible customers. Failure to meet these performance measures, we would request a Corrective Action Plan -- okay, a Corrective Action Plan. And the Contract -- and it's up to the Contract -- the State Contract Monitor to approve or deny the Corrective Action Plan.

This RFP also has payout points, and, as you can see with the payout points, they line up with the majority of the performance measures. So, as you can see, the payout points, these are the different tasks that I just spoke about throughout the work -- scope of work. We also have deliverables that should be delivered. Some are monthly; some are weekly reports. And I'm trying to get down to the reports. Okay. Here we go.

So as deliverables, we're asking that these would be in an Excel file. So on a weekly basis, we're asking for a list of individuals denied SSA benefits. On a weekly, basis we would like a list of individuals, LDSS workers or adult customers, who did not cooperate with the SSA Benefit application process. On a monthly basis, we're asking for a status update on applications submitted to SSA, and this is for only Functional Area I only. On a monthly basis, we're asking for the statistical report, and that was all the requirements that I just talked about a few minutes ago, and any ad hoc reports, as requested. So that was Section 2, the Scope of Work.

I am now going to move on to Section 3, and this is the Contract Requirements. Once this RFP has been awarded, ten days before the start date there will be a kickoff meeting, and that is where we will, you know, meet and get things started and talk -- and finish up anything that needs to be finished up for the project to initiate. At the end of this Contract, there will be a Contract transition. And keep in mind, there should be a transition plan and presented to the State Project Monitor at least 120 days before the end of the Contract. And then the transition plan should be in place within 90 days before the end of the Contract.

Do note that all data that is shared with the Vendor, it is -- the State owns that data, so all data, all paper, electronic, however you receive data from DHS needs to be returned back to DHS and/or, if it's electronic, destroyed.

Invoicing. The invoice would be due by the 15th of every month. There is a requirement that is -- that's needed onto the invoice you can see in 3.3.1.C, and these are the requirements that needs to be placed on the invoice, such as Contractor name and address; remittance address; federal tax id; invoice period; invoice date; invoice number; State-assigned Contract number; State-assigned Blanket or Purchase Order number; goods or services provided; amount due; and any other additional documentation required by regulation or the Contract, such as award letters and such. If the invoice does not meet these requirements, the invoice will be denied. So once you have the approval of the Contract Monitor, then you'll be allowed to use that invoice to submit your invoicing.

There is no reimbursement for travel for this RFP. Also, as a Vendor, you must make sure that you have a Disaster Recovery Plan in place -- okay, Recovery and Data Plan in place. This RFP does require a SOC 2 -- a SOC 2 audit, and you must also have insurance in place. You must have Commercial General Liability insurance, Errors and Omissions/Professional Liability insurance, Crime insurance and Employee Theft, Cyber Security and Data Breach, Workers' Compensation, Automobile and Commercial Truck insurance.

We also required that all employees have identification, especially with the State, so any State building that a staff -- a Vendor's staff enters must have identification, and all staff must have a criminal background check that is required. And also dealing with the State, data -- you must have data protection and controls in place. When you are putting your controls in place, we're asking that you visit the Center for Internet Security or CIS or the Security Technical Implementation Guides to make sure that your security is nice and tight and meets the State requirements.

You must also have security logs and reports access at all times and a Security Plan in place. You also need to have a Security Incident Response Plan in place as well. We're also asking to make sure that you have Problem Escalation Procedures in place, or PEP, and once you have that written up, that needs to be sent to the State Project Monitor to review and approve.

Sang already spoke about experience. We're also asking that the Vendor be available between the hours of eight to five for any questions or concerns that comes up by DHS. Any time there is any change in the key personnel, you must submit -- one, notify the State Contract Monitor that there is going to be a change in key personnel; also submit the background check of the new personnel that's going to be taking place; and you need approval from the State Project Manager if that person, you know, satisfies whatever position it is that that person's going to replace. We're also asking by the 15th -- yeah, 15th of the month, we also need the MBE reports -- okay, MBE reports -- and the VSBE reports. Okay. Well, that ends Section 3. I believe, Sang, I'm going to kick it back to you, and thank you.

MR. KANG: Thanks, Jackie. Thanks, Tawanda. Okay. I'm going to move on to Sections 4, 5, and 6 of the RFP. Okay. Let's start with Section 4.2, which is eMaryland Marketplace. Just know that you need to be registered with the new eMMA system to receive a Contract award, so please insure that you are registered with eMMA. Section 4.3 is Questions. If you have any questions concerning the solicitation, you can ask them later today or also send them by e-mail, and we will answer those questions for you, and they'll be published. The procurement method is Competitive Sealed Proposals.

Section 4.5. Proposal due date is May 17th at three p.m. So with the Proposal due date, requests for extension to the State will not be granted. Offerors submitting Proposals should allow sufficient delivery time. You're submitting through eMMA, so just in case there are any computer issues, you may want to do that beforehand.

Let's see here. You also want to submit your Proposals after all the questions are answered, so my advice on that is just to do that towards the end -- near the due date, but give yourself at least a couple of days. Okay. Your Proposals may be modified or withdrawn before the time and date set forth in the RFP for the due date. Proposals will not be accepted by e-mail or fax.

Okay. I'm going to move to Section 4.6. Multiple or alternate Proposals will not be accepted.

However, we are asking that you send us a separate Technical Proposal and Financial Proposal for each Functional Area.

Section 4.7. Please be straightforward and concise with your Proposals. I'm going to skip to Section 4.9, Award Basis. The Contract will be awarded to the responsible Offeror who has submitted the Proposal which is most advantageous to the State, considering price and evaluation factors. And an Offeror may be awarded for more than one Functional Area, so you can be awarded a Contract in both Functional Areas. Offerors may be required to make oral presentations to the State, and the oral presentation -- it becomes part of the Technical Proposal, provided that there are clarifications, and then your responses to the clarifications, those would then become part of the Proposal. Your Proposal is good for 180 days. If the RFP needs to be revised, we will issue addenda to the RFP on eMMA and also the DHS website, so please be -- I will try to let everyone know if there are amendments or questions and answers.

So we are on Section 4.13. The State reserves the right to cancel the RFP.

Section 4.15. If there is a protest or dispute, we're going to use COMAR Section 21.10. I am skipping around a little bit in Section 4. Please be sure to, you know, read the whole RFP.

Section 4.17. By submitting a Proposal, you are accepting all the terms and conditions in the RFP and also the Contract. You can make exceptions to the RFP requirements, and I'm going to say this later, but you can put that in your Executive Summary, if you're taking any exceptions to the RFP. If you take exceptions, however, we may not accept them. I'll get into that later.

All right. Section 4.18, Proposal Affidavit. Please submit one with the RFP.

Section 4.21. Please be registered with SDOT (phonetic) -- excuse me -- SDAT, State Department of Assessments and Taxation. And I'm going to turn this over to Jessica, who will present Minority Business Enterprise and also Veteran Small Business Enterprise.

MS. HORTON: All right. So good morning, everyone. As I said before, my name is Jessica Horton. I'm DHS's Minority Business Enterprise Director and Veteran-owned Small Business Enterprise Liaison.

Each Department is required to examine the procurements on a contract-by-contract basis and set appropriate MBE and VSBE goals. This solicitation does have both an MBE and a VSBE goal. The MBE goal is 29 percent, and the VSBE goal is 6 percent. The Prime Contractors are required to certify that they're willing to make a good faith effort to meet those goals. There are additional forms for both MBE and VSBE that need to be completed and submitted during the bid process and then others once the Contract has been awarded. First, I'm going to touch on the MBE Program forms. The D-1A form is the MBE Utilization and Fair Solicitation Affidavit, as well as the MBE Participation Schedule. This is where you certify that you intend to meet the MBE goal, and it's required to be submitted with your bid. If you cannot commit to meeting the entire goal, a request for waiver supported by documentation of good faith efforts must be submitted. If the waiver is denied, however, you will not be eligible for award. The last thing I want to mention for the MBE goal is making amendments to the Participation Schedule. Once the Contract is awarded and the MBE subcontractors have been secured, an MBE cannot be terminated without prior written approval from the Department and an MBE can only be terminated upon a showing of good cause. Historically, good cause exceptions have been granted for circumstances, such as ineligibility, unavailability, or inability or refusal to perform.

Similar to the MBE forms, the E-1A form is the required form for solicitations with a VSBE goal. The form -- this one is the Utilization Affidavit and Prime/Subcontractor Participation Schedule. This is where you certify that you intend to meet the VSBE goal, and this form must also be submitted with your bid. As with the MBE Program, if you cannot commit to meeting the goal in its entirety, you can request a waiver, which will be submitted along with good faith efforts documentation. And, again, if that waiver is denied, you would not be eligible for award. And, again, like the MBE Program, the Participation Schedule for the VSBE Program can only be altered after written notice is given to and approved by the Department. If any of you have any questions about either of the programs, my e-mail is – jessica.horton -- H-O-R-T-O-N -- 1@maryland.gov, and my phone number is 410-767-1653. You can reach out to me anytime. I'm going to put my contact information in the chat as well.

MR. KANG: Thank you, Jessica. I'm going to present the Living Wage requirements at this time.

MR. GLASSBAND: Sang, I'm sorry for interrupting. It's Rick.

MR. KANG: Yes.

MR. GLASSBAND: Did you see my e-mail? I notice there's a discrepancy between the information sheet on the MBE goal and Attachment D, the documents for the MBE goal.

MR. KANG: Okay. Is it like between 25 and 26?

MR. GLASSBAND: 25 on the attachment and 29 on the information sheet, so I guess you'll need an amendment.

MR. KANG: Yeah. We'll need to clarify for the Offerors by amendment whether it's 29 or 25, and I'm not remembering offhand, so please let us -- just let me fix that. Yeah, I don't remember which one it is. Okay. I'm going to present Living Wage. Thanks, Rick. So there are Living Wage requirements to the RFP. If a Contract is over 100,000, then Maryland law requires that Contractors pay a Living Wage to covered employees on all State service contracts. So there is a Living Wage attachment that you should fill out. It's Attachment F-1.

Now, the actual Living Wage, the amount depends upon what tier that the majority of the services take place. So Tier 1 is essentially the DC Metro area and the Baltimore Metro area, so Montgomery, Prince George's, Howard, Anne Arundel, Baltimore County, and Baltimore City. Tier 2 is any other area within the State. So if -- I'm going to try to get this right -- if the Contractor provides more than 50 percent of the services from an out-of-state location, the State agency determines the wage tier based on where the majority of the service recipients are located. So whether it's Tier 1 or 2 depends on the recipient, if you are out of state. But, normally, the Contract will be determined to be Tier 1 or 2, depending on location from which a Contractor provides 50 percent or more of the services. So just keep that in mind, and please ask any questions on Living Wage, if you have any.

There are federal funds associated with this RFP, so please also submit Attachment G. Please submit a Conflict of Interest Affidavit and Disclosure. That's Section 4.30, Attachment H I believe. If you are awarded a Contract, a Non-Disclosure Agreement will be required. That you can send with your Proposal or upon award. The HIPAA Business Associate Agreement doesn't apply here. And there is a Location of the Performance of Services Disclosure. That's Attachment L, which you need to submit with the Proposal.

Okay. At this time, I'm going to introduce Kenneth, who will present the Hiring Agreement section.

MR. JESSUP: Good morning, everyone. I'll try not to take too much of your time. Just give me one second while I share my screen.

(Whereupon, a document was shared on the screen.)

MR. JESSUP: So it's short. The purpose for the Hiring Agreement Program -- you should have a copy of this when you got the calendar invite, but just to reiterate, the purpose of the Hiring Agreement is to use a mechanism for providing current and former Family Investment Program recipients with employment opportunities for State procurement contracts. The authority comes from State statutes, which you can review at your leisure.

The background of the Hiring Agreement, it's an additional clause for State procurement contracts. It's an agreement between a Contractor and the Department of Human Services or through any of our Local Departments of Social Services to specifically identify and hire former and current Family Investment Program participants to fill job openings in the Contract and State procurement. Keeping in mind, that background piece there, it's provided that we also screen and also review the specifications for the positions before we have our individuals to apply for the positions.

The contract term is for two years or longer usually on Contract amounts valued at $200,000 or greater, and at some point over the life of the Contract it should produce some type of jobs to include subcontractors as well. The whole point and purpose of the Hiring Agreement is to make sure that we can get individuals that need jobs to individuals that need people to fill the positions.

Your hiring process does not change. Unlike MBE, there is not a requirement behind the agreement. We just simply ask that if you post a position during the life of the Contract, that you allow us five business days to review to see if we have adequate applicants to apply for the position and to get an interview. If they interview and you determine that they're not a going to be a good fit for the company, it is what it is. If you interview them and you decide to hire them, we are elated about that, and we just ask that you communicate with us if there's any concerns or issues about any applicant that may apply. If you have any questions, you can always e-mail me at the two e-mails listed below, or if you have any questions now, please do.

MR. KANG: All right. Thanks, Kenneth. Let's see here. I'm going to pick up where Kenneth left off here. This is a not a Small Business Reserve procurement. And that concludes Section 4. I'll try to move quickly through Section and 6 here.

So Section 5.1. There is a two-part submission, Technical and Financial Proposal. Technical Proposal is Volume I. Financial Proposal is Volume II. But you can submit a Proposal for each Functional Area, but you have to submit separate Technical Proposals and label them as such.

Section 5.2, Proposal Delivery and Packaging.

Essentially, you have to submit the Technical Proposal and Financial Proposal by -- through eMMA. We're not accepting through fax or e-mail. Please submit the Proposal by the due date and time on the Key Information Sheet. There are instructions on the Quick Reference Guide to -- on how to submit a double-envelope response to this solicitation on eMMA. If you have any problems with that, just please reach out to me. I'll try to help.

There are certain -- you have to submit a Technical Proposal in Word format, searchable Adobe PDF, and also a second searchable Adobe PDF copy with your confidential and proprietary information. For Financial Proposal, you have to submit a price form spreadsheet within eMMA with any supporting materials in PDF format, and then also the Financial Proposal in searchable Adobe PDF format, and then a second searchable Public Information Act PDF copy of the Financial Proposal. That's all there in Section 5.2.

Section 5.3 is your technical response. You want to -- so this kind of important -- you want to respond to every section of the RFP, so you want to reference the RFP in your response to the scope of work. So I would put, like, you know, Section 2.2 or whatever, and then the title of that section, and then your response to that underneath. It makes it much easier for the Procurement Officer to go through and evaluate.

So each Technical Proposal should have these tabs in Section 5.3. You should have, like, a -- you know, before, we did this -- like, you guys would send binders to us -- I'm sure you remember that -- and you would actually have tabs. I don't know how you do it on the electronic copy, but please label it somehow, so that we know which tab we're looking at.

The Title and Table of Contents is Tab A. Tab A-1 is where you're going to identify your confidential information -- confidential and/or proprietary information. We'll move to Tab B, which is your Transmittal Letter and Offeror Information Sheet. The Transmittal Letter should be very short and just acknowledge -- just to transmit the Proposal and then acknowledge any addenda to the RFP. That's why you want to wait until all the addenda are issued. Executive Summary is Tab C. You're condensing and highlighting the Technical Proposal as a whole -- summarizing it. If you take exceptions, you're going to include them here, and so this is the part -- exceptions may not accepted, so if they're not accepted, then it could result in your Proposal being deemed not acceptable or not reasonably acceptable for award.

Tab D is Minimum Qualifications documentation. Just please put the reference letters, if you are, like, a preferred Offeror -- if you're trying to meet the preferred qualifications. Tab E is your actual response to the scope of work. As I said before, you might want to read this section pretty carefully -- all of Section 5.3. You want to actually put the requirement down in the RFP and respond to it; like, you want to especially do that for Sections 2 and 3. That's the first point of 5.3.2.F there. All right. So you are giving a definitive section-by-section description of your proposed work plan to meet the requirements of the RFP. And the work plan should include specific methodology, techniques, and number of staff to be used by the Offeror in providing the goods and services. You are required to put an implementation schedule and also the location from which the services will be provided.

I'm going to move to Tab F here, Proposed Staff. You're providing a general staffing plan, and also note that there is one key personnel. I believe that Jackie went over this, but there is one key personnel located in Section 3.10. And you will need to provide a resume for the key personnel, intended letter of commitment to work on the project, and I think that's it, but the actual -- the whole -- the staffing plan, as a whole, should have an organizational chart as well.

All right. Tab G is Offeror Qualifications and Capabilities. You are providing past experience on similar projects. Tab H are your references, and you can use the same letters of reference that you have for minimum qualifications, Section D. List of current or prior State contracts within the last five years. Tab J is your financial capability, so you are providing financial statements, essentially. Certificate of insurance; you are just providing your current copy here, and then, upon award, you'll have to send us an updated one. Subcontractors; you're just listing your subcontractors for the Contract, especially if they are MBE or VSBE. Tab M is your Legal Action Summary. I'll let you look at that. And Tab N is economic benefit factors. They -- a narrative describing benefits that will accrue to the Maryland economy as a result of performance on the Contract. I believe that is the last of the tabs.

Now, Section 5.2 -- or, actually, the last section of Section 5 is for the Financial Proposal. And just please remember that you're submitting a separate Financial Proposal for each Functional Area. Please follow the directions on the Financial Proposal, and, you know, send out questions if you are confused by it.

So Section 6 is the Proposals will be evaluated. We are using COMAR 25.05.03 for the RFP -- Request for Proposals. And there will be an Evaluation Committee. The Evaluation Committee will review the Proposal, then provide input to Procurement Officer.

Section 6.2 is your Technical Proposal Evaluation Criteria. So that list there, your technical response to the scope of work is first. It is in order of importance. So your technical response is first; your qualifications and capabilities are second; experience and qualifications of proposed staff is third; and economic benefit to the State, that's fourth. Financial proposal evaluation criteria, pretty easy. That's the lowest to the highest ranked.

We're going to skip Reciprocal Preference. Well, actually, there is a -- so the Reciprocal Preference rule essentially is if the state that you are applying from has a --- it favors those companies in the State -- in State, and we can also apply that in our -- in our ranking. It doesn't come up that much. Let's see here. Selection Procedures. Again, we are

-- we are going to be evaluating in accordance with COMAR 21.5.03 for Competitive Sealed Proposals. Okay. This is kind of important. One of the first things that we do is to see if the MBE forms are filled out correctly, so -- and VSBE, so please insure that those forms are filled out accurately, and I'm available to help with that.

Let's see here. The general process on evaluation of Proposals is that Technical Proposals are evaluation and then ranked. During that process, there can be clarifications and clarification responses and oral presentations as well. So after we rank technically, we will rank financially. And then after that we will -- well, there's a possibility of the Best and Final Offer also, and then after that we will make overall rankings. In making the overall ranking determination -- this is important -- technical factors will receive equal weight with financial factors. Okay. All right. So that pretty much concludes the -- our presentation of the RFP. Section 7 lists your attachments and appendices. It's kind of a good reference to see which affidavits you have to include in your Proposal submission. So we are concluded. Are there any questions about the RFP?

(No response.)

MR. KANG: So there are going to be no questions today? I mean, I assume that you will send some questions in writing, but if that is -- if there are no questions, then I think we can conclude our pre-proposal conference today. So please remember Proposals are due at three p.m. on May 17th, and I just want to thank everyone for attending.

(Whereupon, at 11:06 a.m., the pre-proposal conference was concluded.)

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C O N T E N T S

CERTIFICATE OF NOTARY

I, Deborah B. Gauthier, Notary Public, before whom the foregoing Pre-Proposal Conference was held, do hereby certify that said Pre-Proposal Conference is a true record of the proceedings; that I am neither counsel for, related to, nor employed by any of the parties to this action, nor financially or otherwise interested in the outcome of the action; and that the Pre-Proposal Conference was reduced to typewriting by me or under my direction.

This certification is expressly withdrawn upon the disassembly or photocopying of the foregoing transcript, including exhibits, unless disassembly or photocopying is done under the auspices of Hunt Reporting Company, and the signature and original seal is attached thereto.

Deborah B. Gauthier

DEBORAH B. GAUTHIER,
Notary Public in and for the
State of Maryland

My Commission Expires: October 17, 2023