

STATE OF MARYLAND

PROCUREMENT MEETING

MARCH 29, 2018

Transcribed By: Always On Time

1 DAVIS: Okay. We have a couple of folks signing
2 in but I'm going to start. Good morning everyone. I'd like to
3 welcome you all to the Pre-Proposal Conference for the Maryland
4 Department of Health, Development Disabilities Administration,
5 Management Consulting and Program Management for continuous
6 development of developmental disability administration
7 functionality and long-term services and supports. That's a
8 mouthful.

9 This is #19-1917976. eMaryland Marketplace
10 #MDM0031037819. I'm sure all of you have already signed in on
11 this sign-in sheet. Hopefully you've left your business cards
12 in case we have some problem reading handwriting and we're able
13 to contact you immediately.

14 My name is Queen Davis. I'm from the [inaudible]
15 Procurement Support Services. I'm the Contract Officer for
16 this procurement. The Deputy Director of the Procurement.
17 Dana Dembrow is the Procurement Officer. I would like to take
18 this opportunity now to introduce everybody. After we're done,
19 we'll give an overview of the procurement process and then turn
20 it over to the Program for programmatic overview. Then we will
21 entertain questions and answers.

22 Let me announce first that we have received questions
23 prior to this meeting. We intend to have the questions
24 answered and submitted with the minutes within the next week.
25 If some questions are significant, they may take a little

1 longer to get them answered, but be sure that we will answer
2 all of your questions and post them as quickly and as
3 [inaudible] as possible.

4 I'm going to start on my right with Dana Dembrow.

5 DEMBROW: Thank you Queen. As Ms. Davis mentioned,
6 my name is Dana Dembrow. I'm the Director, Chairman for the
7 Department of Health. I'm going to amend something that Queen
8 just said. It seems that it may be a good practice for you to
9 leave several business cards, here at the sign in sheet, so
10 that if you are [inaudible], you're a client/contractor,
11 potential, maybe you'll pick a card and vice versa. So, in
12 addition to make sure that Ms. Davis gets a copy of your
13 business card if you have one, please feel free to leave
14 several of them here at the table before you leave and then
15 others can take that business card and follow-up at their
16 leisure.

17 DAVIS: Thanks Dana.

18 ROBINSON: Janelle Robinson, Director of MBE
19 Programs, Department of Health.

20 DAVIS: Again, my name is Queen Davis.
21 [inaudible] Office of Procurement and Contract Office for
22 Request for Proposals.

23 DUNN: Victoria Dunn, I'm the Chief of
24 Procurement for the DDA.

25

1 RODDY: I'm Valerie Roddy. I'm Director of
2 Fiscal Services and Operations for DDA and I'm the Contract
3 Monitor on this [inaudible].

4 SCISTOGNE: My name is Patricia Scistogne and I'm
5 Director of Programs for the Development Disability
6 Administration.

7 DAVIS: We'll start with the-

8 DONALDSON: My name is Dane Donaldson. [inaudible]
9 Solutions. [inaudible].

10 CONTRINO: Hi, my name is Khin Contrino. I'm with
11 PTS.

12 FINE: I'm Lawrence Fine with Integrated
13 Technology Solutions, Inc. We are also an MBE, prime
14 [inaudible] significant partner on others.

15 SPEAKER: [inaudible].

16 TOKAR: Good morning. Leonard Tokar with Public
17 Consulting Group.

18 TOWLES: Good morning. Josette Towles,
19 [inaudible] Technologies.

20 SPEAKER: Good morning. [inaudible] Systems. We
21 are an MBE.

22 FULTON: Good morning. Sheron Fulton with
23 Momentum, Inc., we are a financial consulting firm. We're also
24 MBE [inaudible].

25 SPEAKER: [inaudible]

1 BOLDEN: Scott Bolden with Software Consortium.

2 SPEAKER: [inaudible]

3 BOYLE: Theresa Boyle with AP Ventures. We're a
4 woman-owned MBE and small business.

5 JACKSON: Liz Jackson from AP Ventures.

6 BALA: Shankar Bala from [inaudible] program and
7 process management. [inaudible]

8 LESLIE: Lin Leslie, [inaudible]

9 LOWNDES: Reginald Lowndes, [inaudible] Management,
10 [inaudible] disable veteran owned business.

11 GAMBRELL: Reva Gambrell, Jones, Gambrell
12 [inaudible] Management, Business Process Management.

13 HARLAN: Hi, I'm Daniel Harlan with Alvarez and
14 Marsal.

15 DAVIS: Thank you all. Contrary to what the
16 Agenda says, you are in the right pre-proposal conference.
17 This mentions [inaudible] it is not that. But the Agenda
18 content is correct, so I apologize for that.

19 So, I'm going to give an overview, as I said, of the
20 procurement process. Afterwards, the program will speak to the
21 scope of work and services and then we'll take your questions
22 and answer them. Minutes will be taken from this meeting and
23 will be posted on eMaryland Marketplace and it will also be
24 posted on our MDH Procurement Opportunities website.

25

1 If you decide not to submit a proposal for this RFP, we
2 ask that you complete and return the notice to offerors and
3 vendors form on Page ii. This information that you submit to
4 us will give us an opportunity to plan for future procurements
5 and maybe address some issues you may have with this one, if
6 there are any.

7 Subsequent to this pre-proposal conference, written
8 questions will be accepted by the Department until April 2,
9 2018 at 4:00 PM, to allow for sufficient time to respond.
10 Questions and answers will be distributed to all persons known
11 by the issuing office who has obtained this RFP and questions
12 and answers will be posted on eMaryland Marketplace and
13 [inaudible] Procurement website.

14 Procurement methods for this solicitation is Competitive
15 Sealed Proposals. The contract resulting from this RFP shall
16 be for two years from the effective date of September 1, 2018
17 and the State, as its sole option, may renew the terms of the
18 contract for one additional one year renewal option for up to a
19 total potential contract length of three years.

20 Proposals are due on Wednesday, April 18, 2018. No later
21 than 2:00 PM local time. Proposals will be received at the
22 Maryland Department of Health, Office of Procurement and
23 Support Services, 201 West Chester Street, Room 416, Baltimore,
24 Maryland 21201; to my attention: Queen Davis. Time of
25 submissions are vital. Late submissions will not be accepted.

1 All of this information can be found on the Key Information
2 Summary Page on Page iii.

3 I want to stress to you that this procurement is expected
4 to be in excess of \$200,000. Any procurement in excess of
5 \$200,000 are required to be paid through electronic funds
6 transfer. If you look at Section 4.23, it gives you detailed
7 information on electronic transfer. By submitting a response
8 to this solicitation, you the Offeror agrees to accept payments
9 by EFT, short for Electronic Funds Transfer; unless the State
10 Comptroller's Office grants an exemption. Payment is mandatory
11 though for any contracts exceeding \$200,000. If you look
12 Section 4.23, it gives you the website for the Comptroller's
13 Office and you can also download the Electronic Funds Transfer
14 Form, if you have not also already submitted a document of that
15 type to the Comptroller's Office.

16 There's a minimum overall MBE Participation goal of 5%,
17 for the total dollar amount of the contract awarded in response
18 to the solicitation. There's also a 1% VSBE Participation
19 goal. Please note, the Key Information Summary Sheet lists the
20 MBE goal—I mean, the VSBE goal, I'm sorry, incorrectly at 5%.
21 It is 1%. I received questions regarding that. I will make
22 the corrections through an Addendum, along with the minutes
23 when it's posted. The goal for VSBE is 1% of the total
24 contract dollar amount.

25

1 I will give it over to Janelle so she can give you
2 further information on the MBE requirements.

3 ROBINSON: Good morning. The MDOT Certified MBE
4 Utilization and Fair Solicitation Affidavit which is Attachment
5 D-1 must be fully and accurately completed and submitted in a
6 separate, sealed envelope along with your bid or proposal.
7 Failure to do so will result in your bid or proposal being
8 deemed non-responsive.

9 On the D-1 form, you must first acknowledge and express
10 your intention to meet the overall MBE goal percentage
11 established for the solicitation, again, that's 5%.

12 The MBE participation schedule should include the names of
13 the minority business enterprises that you intend to use to meet
14 the required MBE goal, along with their federal employment
15 identification number, their MDOT MBE certification number as
16 well as their certification category.

17 Only MDOT MBE certification is acceptable. MBE
18 certification from another entity or jurisdiction will not be
19 accepted.

20 Additionally, the percentage of the of the total contract
21 value to be provided by the particular MBE should be entered as
22 well as a specific description of the work that is to performed
23 by that particular MBE.

24

25

1 In the summary, you will break down the specific MBE status
2 of the particular MBE subcontractors and this should be equal to
3 or exceed the MBE goal established for the solicitation.

4 Within 10 working days of receiving notice that your firm
5 is the apparent awardee, you must submit your Outreach Efforts
6 Compliance Statement, Attachment D-2 and your Subcontractor
7 Project Participation Certification, Attachment D-3.

8 You may request of waiver of the MBE goal and within 10
9 working days of receiving notice that your firm is the apparent
10 awardee, you must submit all required waiver documentation in
11 accordance with COMAR 21.11.03.10.

12 Please carefully review the liquidated damages provisions
13 in the solicitation regarding compliance with MBE rules and
14 regulations.

15 Per new regulations, MBE prime contractors may count 50%
16 towards the established subcontracting goal.

17 The VSBE Utilization Affidavit and Subcontractor
18 Participation Schedule, Attachment M-1, must be fully and
19 accurately completed and submitted in a separate, sealed envelope
20 along with your bid or proposal. Failure to do so may result in
21 your bid or proposal being deemed non-responsive.

22 On the M-1 form, you must first acknowledge your intention
23 to meet the overall VSBE goal percentage established for the
24 solicitation, again, that's 1%.

1 The VSBE Subcontractor Participation Schedule should
2 include the names of the veteran-owned business enterprises that
3 you intend to use to meet the required VSBE goal, along with
4 their DUNS Number. Only United States Department of Veterans
5 Affairs certification is acceptable. You may verify those on
6 vetbiz.gov. VSBE certification from another entity or
7 jurisdiction will not be accepted.

8 Additionally, the percentage of the total contract value to
9 be provided by the particular VSBE should be entered as well as a
10 specific description of the work that is to performed by that
11 particular VSBE.

12 Within 10 working days of receiving notice that your firm
13 is the apparent awardee, you must submit your Subcontractor
14 Project Participation Statement, Attachment M-2.

15 You may request of waiver of the VSBE goal and within 10
16 working days of receiving notice that your firm is the apparent
17 awardee, you must submit all required waiver documentation in
18 accordance with COMAR 21.11.13.07.

19 In the summary, you will enter the total VSBE participation
20 and this should be equal to or exceed the VSBE goal established
21 for the solicitation.

22 DAVIS: So, let me reiterate something that Janelle
23 just explained to you [inaudible] very clear. You can also refer
24 to [inaudible] Section 4.26, where it gives detailed information
25 on the requirements of the MBE participation.

1 Failure to submit your MBE form, Attached D-1A with your
2 proposal as required will result [inaudible] here, determining
3 that your proposal is [inaudible] of being selected for award.
4 There is no [inaudible] to not including your MBE D-1A
5 Attachment, completely and accurately. [inaudible] acceptable if
6 you complete it incorrectly.

7 DEMBROW: Can I say that one more time?

8 DAVIS: [crosstalk]

9 DEMBROW: I'm sure it is frustrating to the vendor
10 community to spend a lot of time developing a sophisticated sound
11 proposal and then you don't pay enough attention to Attachment D
12 and we have to reject you. We cannot allow [inaudible] we are
13 not allowed to consider your proposal.

14 It is frustrating for us too, because we want to have as
15 many proposals as possible. So, please, pay special attention to
16 all the requirements of Attachment D and complete that form in
17 its entirety, thank you.

18 ROBINSON: And Attachment M.

19 DAVIS: And Attachment M, the VSBE. And additional
20 information regarding the VSBE can be found in Section 4.27.

21 DEMBROW: You might be surprised at how many
22 proposals we get that we have to reject because somebody made a
23 simple mistake on Attachment D or M on this. Thanks for letting
24 me interrupt.

1 DAVIS: [inaudible] folks sometimes will call me
2 and say, well we forgot, we didn't—you know, we were supposed to
3 put this information—there's nothing we can do about it. You
4 know, that is a fatal flaw in the [inaudible] and it will not be
5 considered.

6 So, Section 1 is the Offeror Minimum Qualifications.
7 [inaudible] you find that there are no minimum qualifications
8 listed there.

9 Section 2 is the Contract Requirement and the Scope of Work
10 Section. As I said, the Program will give an overview of this
11 section after I complete my Procurement Process Overview.

12 Section 3 of the RFP is the Contract General Requirements.
13 It relates to the RFP. Please review this section carefully as
14 it details important requirements if awarded the contract.
15 [inaudible], you are required to acknowledge this section at the
16 very least, just as you are required to address each of the
17 deliverables in the Scope of Work, listed in Section 2 of your
18 Technical Submission. So, please don't overlook Section 2. Look
19 over Section 3, I'm sorry, the [inaudible]. At the very least,
20 you do have to acknowledge that you do accept everything that's
21 in there or if required, submit a response to any portions of
22 that section as well.

23 Section 4, lists the procurement instructions. Please
24 review this section as it provides general information and
25

1 detailed explanation regarding the procurement process for the
2 RFP.

3 Section 5 is the proposal format. There is a two-part
4 submission for your proposal. Volume 1 is your Technical
5 Proposal and Volume 2 is your Financial Proposal. The general
6 format for proposals is stated in Section 5. 5.2, Proposal
7 Submission. Your technical and financial proposals are to be
8 submitted in separately sealed envelopes. Volume 1 in its own
9 separately sealed envelope. Volume 2 in an additionally
10 separately sealed envelope.

11 Now, Volume 1 of the Technical Proposal and Volume 1 [sic]
12 Financial Proposal shall be sealed separately and it's preferred
13 but not required that the Name, Email Address, Telephone Number
14 of the contact person for the Offeror be on the outside of each
15 of your packets own volume.

16 Each Volume should contain an unbound, original,
17 [inaudible] and four copies. Unless the resulting packets will
18 be too [inaudible] the Department's preference is for the two
19 sealed volumes to be submitted together in a single packet
20 including [inaudible] -just bearing, No. 1, the RFP Title and
21 Number. 2, the name and address of the Offeror. And, 3, the
22 closing date and time [inaudible] proposal.

23 The Department requires an Electronic Version of Volume 1
24 and Volume 2 and searchable PDF format marked Technical Proposal
25 and it must be labeled [inaudible]. See specifically Section

1 5.2.3 which gives information about [inaudible]. Also, you can
2 see Section 4.8 for detailed explanation of the PIA.

3 Section 5 is your Delivery Section. There are three
4 acceptable means of delivering your proposal. One is by US
5 Postal Service. Please make sure that if you are using the US
6 Postal Service that you mail your proposal off timely so that it
7 can reach its destination by the required dates and times.

8 You can hand deliver by the Offeror. Please make sure that
9 you get a receipt. There is a Administrator sitting at our
10 office and he will accept your proposal. He's required to
11 timestamp your receipt and give you the original and we'll keep
12 the copies, to confirm receipt of your proposal.

13 If you have your proposal hand deliver by commercial
14 courier, make sure your commercial courier asks for this receipt
15 as well.

16 Section 5.4 of the Technical Proposal Section will include
17 all items detailed beginning under Responses, under Offeror's
18 Technical Proposal. It must reference the [inaudible]
19 organization and section [inaudible] and that is all detailed in
20 Section 5.4.2.

21 The proposal organization will allow direct mapping between
22 Offeror responses and RFP requirements by Section Number and will
23 aide in the evaluation process. So, please review Section 5.4.2
24 for the mapping of your response—your Technical Proposal
25 Submission. It is detailed and it tells you what tabs, it has

1 what information and if you follow that, it will not be too
2 cumbersome for the Evaluation Committee to find the required
3 information that they're looking for when reviewing your
4 submissions.

5 Section 5.5 is detailed information about Volume 2, the
6 Financial Proposal. The Financial Proposal shall contain all
7 price information in the format specified in Attachment B.

8 The Offerors are to complete the Excel Financial Proposal
9 Form, only as provided and the price sheet instructions and the
10 Financial Proposal Form itself.

11 We did receive a question informing us that the Financial
12 Proposal Form had an issue with one section of it not calculating
13 to get the total dollar amount of the proposal. I think it was
14 Option 1, wasn't—Option 2 wasn't adding up with the base of
15 Option 1, so the total amount was not correct. I'm going to do
16 an addendum to also correct that and then we'll have an updated
17 version of your Financial Proposal Form. So, we are aware of
18 that issue.

19 The Evaluation Criteria is listed in Section 6 of the RFP.
20 The criteria is arranged in descending order of importance. Your
21 proposals will be reviewed and evaluated by an Evaluation
22 Committee that will be appointed by the issuing office using the
23 evaluation criteria set forth in Section 5 of the RFP. I'm
24 sorry, Section 6 of the RFP.

1 The Committee may conduct discussions with Offerors and may
2 request [inaudible]. If it is determined that discussions are
3 needed, discussions will be held with all Offerors. You will be
4 notified if at any time during the process, if it is determined
5 that your proposal is not [inaudible] of being selected for
6 award.

7 Upon completion of your Technical Proposal and Financial
8 Proposal Evaluation, each Offeror will receive an overall
9 ranking. The Procurement Officer, [inaudible] will recommend
10 award of the contract to the responsible Offeror that submitted
11 [inaudible] proposal determined to be the most advantageous to
12 the State. [inaudible] proposals determination. Technical
13 factors will receive greater weight than the financial side
14 factor.

15 The Contract Affidavit, Attachment C and Contract—and the
16 Contract are not required until after we have determined if you
17 are awarded the contract.

18 I would like to reiterate two important things before
19 turning it over to the Program. Number 1, it is the MBE
20 Attachment C1A, it must be completed and returned with your
21 submission. Preferably in a separately sealed envelope marked
22 MBE documents. If the Offeror fails to accurately complete and
23 submit this Affidavit and Schedule with the proposal as required,
24 your proposal will be determined that—the Procurement Officer—I
25 apologize, the Procurement Officer will determine that your

1 proposal is not acceptable of being selected for award. That's
2 number 1.

3 Most importantly is, untimely submission of your proposals
4 will not be accepted. So, please make sure you get your proposal
5 at the required destination by the required date and time in
6 order to be accepted. Again, proposals are due on Wednesday,
7 April 18, 2018, no later than 2:00 PM local time, at the address
8 listed on the Key Information Summary Page.

9 If you have no questions for me, I will turn it over to
10 [inaudible].

11 SPEAKER: [inaudible] the Summary Sheet, it says,
12 [inaudible].

13 DAVIS: It says, VSBE is 5% but that is incorrect.
14 It is 1%. I will be doing an addendum. It will come out with
15 these minutes and it will have the corrected VSBE participation.
16 The VSBE is 1% though, okay.

17 SPEAKER: Okay, thank you.

18 DAVIS: You're very welcome. Yes ma'am.

19 SPEAKER: Hi. [inaudible] envelopes then, one in
20 Technical, one in Financial and one in MBE?

21 DAVIS: Yeah. We'd prefer that. It's not really
22 required but it makes—that's why I said pre-proposal conference,
23 it makes the initial review of your submission a lot easier. If
24 I see the MBE envelope in there, I'll pull it out. We'll check
25 it. Make sure that you're Certified. MBEs are listed, the

1 description of the work that they're doing, they'll be
2 performing. That they are indeed certified to do that work and
3 then we can move forward with the rest of the process for your
4 specific proposal.

5 So, if you would, we would appreciate putting that MBE in a
6 separately sealed envelope. At times we've had vendors put it in
7 their financial proposal. But the problem is, we can't open up
8 your financial proposal. And so, then that—that gives your
9 proposal not acceptable to be awarded because we can't get to
10 your MBE. So, if you will remember to put it in a separately
11 sealed envelope and [inaudible] soon as we open it up, that's
12 what we'll see and that's what we'll review initially. Yes sir.

13 SPEAKER: So, for the VSBE forms, is that in a fourth
14 envelope, or can that be combine—

15 DAVIS: Well, you can combine it with the MBE. The
16 MBE and the VSBE can be combine. You can put them both in the
17 same envelope.

18 I think that because [inaudible] VSBE has the same rules as
19 the MBE, although we treat it the same. [inaudible] MBE, but if
20 you put your VSBE and MBE together, it will make it a lot easier
21 to determine the participation.

22 DEMBROW: If you don't mind, let me repeat something
23 that Ms. Davis just said, just by way of highlighting. When you
24 submit the separate envelopes, please mark them. Technical

25

1 should be marked Technical. Financial should be marked
2 Financial. MBE/VSBE should be marked accordingly.

3 Frequently we get three envelopes. We have to figure out,
4 gee, if we open this one—if it turns out to be the financial,
5 then your proposal is in trouble. We can't look at the
6 financials until after we're done with the technical. Please
7 make sure that they're labeled separately.

8 The other thing I want to highlight, you all came into this
9 building today. You realize that you had to go through a guard
10 desk. It amazes me how some proposals come running into the
11 fourth floor with two minutes to go, two minutes before 2:00.
12 Thankfully, generally they make it on time, but if you wait until
13 the last minute and you end up not getting past the guard's desk,
14 because you have to make some call to the fourth floor or your
15 proposal goes down to the mail room where it sits for several
16 hours before it gets to the fourth floor, you can find your
17 proposal in jeopardy. We encourage you to submit early, if you
18 can. If you do submit on the due date, make sure that you have a
19 sufficient number of hours to accommodate for traffic, for
20 getting by the guard's desk, for having it shipped from the mail
21 room, whatever delays may be incurred, are going to be on you
22 unless it is purely the fault of the State that your proposal is
23 late.

24 DAVIS: And being downstairs stuck at the guard's
25 desk is not our responsibility. That is your responsibility to

1 be here timely. If we get it upstairs and you say, well I was
2 downstairs for a half hour, I was outside because I couldn't find
3 parking, we have no way of accepting your proposal on those
4 basis. If we can't stamp it in 2:00 or prior to 2:00, it's
5 unacceptable. We won't—it won't be considered. Yes sir.

6 SPEAKER: With the due date three weeks away.

7 DAVIS: Yes.

8 SPEAKER: Do you have a time that you're working for
9 to put out the questions and answers.

10 DAVIS: We're having the pre-proposal conference
11 today. Normally, we try to get the minutes and the questions out
12 within a week. Sometimes the questions are significant and may
13 take a little time to research, answer and you know, respond to
14 your questions. We take all of that into consideration with, you
15 know, if we have to do an additional extension. That will be
16 determined by Dana if we should allow for an extension of the due
17 date. And you—you will have time, plenty of time, if we are
18 going to do an extension.

19 And normally, if you request an extension, you know, we try
20 to accommodate.

21 DEMBROW: This is an urgent issue so we're trying to
22 move it forward expeditiously, but if you feel the need to take
23 more than three weeks, if you let us know during this meeting, we
24 will be able to start considering that request today.

25

1 DAVIS: Also, submitting your request through the
2 MBH Solicitation Questions email address. But we take all
3 requests into consideration. [inaudible] forward expeditiously
4 as practical, so that we can meet the deadline of the start date.
5 The start date is—must be September 1. Yes sir.

6 SPEAKER: [inaudible]

7 DAVIS: No sir.

8 SPEAKER: [inaudible]

9 DAVIS: Well, that's [inaudible] we want hard
10 copies for our service, our contract services. Until we move in
11 that direction, we have not moved in that direction yet. But we
12 request hard copies and the electronic version that's listed in
13 the RFP. Yes sir.

14 SPEAKER: [inaudible]

15 DAVIS: Say it again?

16 SPEAKER: [inaudible]

17 DAVIS: Well, they are based on the [inaudible].

18 It's not a CAT contract, it's just a regular service contract.

19 SPEAKER: [inaudible]

20 DAVIS: Yes, you go by the [inaudible] not by CAT.

21 Yeah, you're not going by the requirements of CAT Contract. All

22 requirements are listed in the—these are the only requirements

23 that you have to meet. That's listed in the file.

24 SPEAKER: [inaudible]

25

1 DAVIS: I suggest that you submit your proposal and
2 let us review it and we will take into consideration everything
3 that you submit to us.

4 SPEAKER: Is there a current contract in place?

5 DAVIS: There is a current contract that Alvarez
6 and Marsal are the current contractors.

7 SPEAKER: Okay.

8 SPEAKER: Can you repeat that please?

9 DAVIS: Alvarez and Marsal, Public Sector LLC.
10 Alvarez, A-L-V-A-R-E-Z and Marsal, M-A-R-S-A-L. Public Sector,
11 LLC.

12 SPEAKER: Can you repeat it one more time?

13 DAVIS: Alvarez, A-L-V-A-R-E-Z and Marsal, M-A-R-S-
14 A-L. Public Sector, LLC.

15 SPEAKER: And when does that contract expire?

16 DAVIS: August 31st. It's been in place since 2012.
17 Oh, I'm sorry, 2016. It's been in place since—it's been in place
18 for two years.

19 SPEAKER: [inaudible]

20 DAVIS: Absolutely. [crosstalk] M-A-R-S-A-L.

21 SPEAKER: [inaudible]

22 DAVIS: They are—yeah, they [inaudible] [crosstalk]

23 DEMBROW: They are present today.
24
25

1 DAVIS: Yeah. Okay. So, if there are no more
2 questions for me, I'm going to turn it over to the program and
3 they can speak a little to the—

4 SPEAKER: I'm going to give a very brief and high-
5 level overview. There's a lot of details in the RFP.
6 [inaudible] I want to leave plenty of time for questions. So,
7 I'll keep this very high-level and be happy to answer any
8 questions you may have.

9 The Development Disabilities Administration has been
10 undertaking transformation activities for the past three years.
11 Those activities involve a complete overhaul of our service
12 delivery system. That includes the submission and the approval
13 of two new home and community based waivers in CMS that have been
14 approved and implemented just [inaudible] January and we're also
15 about to submit our Comprehensive Waiver for Renewal, for
16 consideration by CMS.

17 The Comprehensive Waiver contains all new—a lot of new
18 services. Some were redefined but it is fairly comprehensive and
19 will change and very much so, the way that our services are
20 provided to our network of 200 providers.

21 We do serve approximately 24,000 people, mostly in the
22 community. Probably 23,995 are in the community. [inaudible]
23 activities is the transition from our standalone IT platform
24 which is called PPIS2 and we are going to—we are developing

25

1 functionally in the Medicaid Long-Term Supports and Services
2 System.

3 That effort has been underway for probably close to three
4 years. We are also-part of this Transformation Act-or, one of
5 the many activities includes also a change in our prospective
6 payment system, to a reimbursement model. This is a huge ship
7 for our providers. They have been getting the-the prospective
8 payment has been in place for about 30 years.

9 These are all major efforts. They are all interrelated.
10 They are not-on their own, they are all interrelated. So, often
11 times when you make a decision about one area, you're affecting
12 the other areas that we are working on currently.

13 We're looking for management consulting services to support
14 us in this effort, DDA. Like many government agencies,
15 [inaudible] in-house talent to do this, plus our staff are doing
16 their jobs. So, we really need assistance in moving this project
17 forward.

18 We have three areas. The RFP outlines three areas, major
19 areas of support. One is oversight and program management. The
20 other is change management and stakeholder engagement. The third
21 is support for the definition and development on functionality
22 and [inaudible]. All of these are very important and again, very
23 integral to the success of our transformation activities.

24 This requires the ability of any vendor or contractor to
25 have experience with [inaudible] engineering and understanding

1 the implementation of complex business processes. They must be
2 able to work effectively with IT vendors to translate our
3 business processes into system specifications and to manage
4 dependencies related to the multi-transformation efforts. Also,
5 to help us sort out sometimes, the technical solutions and the
6 programmatic and payment system.

7 So, there's—as I said, I can't emphasize enough, all of
8 this is interrelated. It is not strictly an IP project. I want
9 to make that very clear. As I said, this is an ongoing effort.
10 We are [inaudible] release date of our functionality and LPSS is
11 scheduled for August 1, 2018. There will be two interim
12 issuances of the releases and also then another release the
13 following summer of July of 2019.

14 That's really high-level, do you want me to just to talk—I
15 can talk for hours [crosstalk]. I would imagine you might have
16 more questions. I'd be happy to answer any questions.

17 SPEAKER: One of the things that was brought up was
18 the staffing. That it was based upon mainly the project being
19 for IT. It's not based on that.

20 SPEAKER: Okay. The staffing requirements in that is
21 it's more than just IT because they have to have more knowledge
22 base that would be more DDA related. So, it's not just IT
23 related.

24 DAVID: Not DDA, but Development Disability
25 related.

1 SPEAKER: Right. So, we're really looking for--this
2 is kind of unusual because I've [inaudible] we're really looking
3 for a cross between someone's who has got some IT knowledge along
4 with [inaudible], be able to translate our business into
5 technical solutions and understanding that. Also, being able to
6 work with our program staff to understand what they do and how it
7 works so that you can take that information.

8 Also, while we're doing this effort, we're also looking at
9 improvement. We're not necessarily mirroring, you know, business
10 as it exists now. In fact, we're not--it's not going to look
11 anything like it.

12 As I mentioned, there have been two phases of the LTSS or
13 there will be two releases of the LTSS functionality. The first
14 phase really involves all of our intake and eligibility. It
15 involves our person-centered plans. It involves--we have a
16 waiting list for services. So, we're looking at [inaudible] to
17 help us in the management of that waiting list.

18 The second release, the following year, the other major
19 release I should say because there will be interim releases,
20 involve the transition to our new billing/payment. The other
21 item--the other issue--the other transformation activity going on
22 is that DDA for the past two years has also been involved in a
23 rate setting study. That's being done by an outside consultant.
24 We're in the process right now of working with our stakeholders,
25 primarily our providers, to work through and verify that the

1 assumptions made in the rate study are correct. If there's any
2 adjustments, to make sure that we get it right.

3 The one thing that we do know, as I mentioned before, our
4 payment model has been in place for 30 years. Our statute is 30
5 years old. We've been doing business for around 30 years. So,
6 when you make the change here, this change is not just for 5-10
7 years, it will probably last a lot longer. We're really
8 endeavoring to get it right, so it has been challenging.

9 So, again, there are just a number of just dependencies.

10 SPEAKER: [inaudible] whoever is granted this would
11 need to have some—when we're talking about DDA, we understand
12 that [inaudible] —part of the things we're working is
13 transforming the entire [inaudible] all the way from the
14 [inaudible] which is the provider [crosstalk] system and it has
15 [inaudible] —you have to integrate a person-service driven
16 [inaudible] a business process with then being able to
17 [inaudible]. So, we're looking for expertise in both parts. The
18 operational program and the business model of it. Then be able
19 to work with DDA's leadership and programs and have to enhance
20 [inaudible] better service delivery in the entire system. That's
21 what we're looking for. Someone that [inaudible]

22 DEMRBIO: Before we take questions, a couple of
23 people arrived after we did initial introductions. I wonder if I
24 could give you the opportunity to introduce yourself to everyone
25 here with your name and your company number. Or your company

1 name. [inaudible] as well as Deputy Secretary for the Maryland
2 Department of Developmental Disabilities Administration is here.

3 SPEAKER: [inaudible] Secretary of DDA and I think as
4 Patricia and Valerie said, this is it for us. This is not just
5 like, you know, [inaudible]. So, that is the easy [inaudible] in
6 my mind. So, you do a rate study and you get a rate.

7 [inaudible] this process was unbundle the services that we
8 currently have in our [inaudible] so that you have [inaudible]
9 right. [inaudible] the old system, this is what [inaudible] in
10 the new, it was unbundled into four different areas.

11 So, we've gone from like 22 service definitions to like 38
12 or whatever. So, that's a really complicated system. So, that's
13 just an overview of [inaudible] we are.

14 SPEAKER: There is something I just thought about, I
15 wanted to bring up. Again, I did mention briefly the
16 descriptions of our three major areas of work and that is our
17 stakeholders. As I mentioned, we have a network of over 200
18 providers that serve approximately 24,000 people. These are our
19 stakeholders. So, it's the individuals we serve and their
20 families.

21 Throughout this project, we have involved our stakeholders
22 and primarily, in this transition from—of our IT system, we have
23 engaged a great deal with our providers because they will be
24 using the system.

25

1 So, the work—you know, when we're talking about our
2 business process and not only working with our internal staff but
3 it's also working with our stakeholders, our providers.
4 [inaudible], so that's a major focus of our effort. It is a
5 critical component in—truly, without their input into active
6 participation—we don't always agree, but we do take their input
7 very seriously. So, that is an important component to the
8 success of this effort.

9 DAVIS: Can I ask the lady and the gentleman that
10 just came in, if you would introduce yourself at this time?

11 JACKSON: Good morning, Michele Jackson. Park Ulman
12 Consulting.

13 DAVIS: Okay, and?

14 MURALI: I'm [inaudible] Murali. I'm with Teja
15 Group. I present as VSBE and MBE.

16 DAVIS: Okay, thank you very much. So any more
17 questions? Yes.

18 SPEAKER: [inaudible] effort but you were saying that
19 August, around mid-August you're going to have one release
20 related to eligibility or [inaudible]. So, but the contract
21 award is in September. So, the management consulting group will
22 be overseeing the second part, or [crosstalk]

23 SPEAKER: [inaudible]

24 [crosstalk]

25

1 SPEAKER: So, the first release will occur on August
2 1st. That includes the sections I talked about. The eligibility,
3 the person-centered plan or management of our waiting list. So,
4 you know, we're hoping—there's also [inaudible] one in probably
5 November and another one in January. Again, all related to the
6 elements in the first release.

7 The second release will occur in July of 2019 and that is
8 [inaudible] billing. In terms of the timing, it is unfortunate
9 but that's the way it is, we're bound.

10 SPEAKER: Okay. So, [inaudible] support is kind of
11 like, ongoing.

12 SPEAKER: Yes, it will be [crosstalk] right because
13 we have all the work to leading up to the second release. And
14 we'll probably—you know, we'll have to work [inaudible], you
15 know, there's always stuff that doesn't quite work the way you
16 thought it would. There may be bugs, there may be some other
17 issues we might find.

18 At the beginning when we first started this, when we first
19 started this project [inaudible] we envisioned the two releases
20 [inaudible] and as we've worked on it through the years, things
21 have come up and so now we have [inaudible] releases. We're
22 hoping not to have any more [inaudible] releases after release 2,
23 but you know, you just don't know.

24 SPEAKER: [crosstalk] [inaudible] we have a
25 partnership with OHS, with their Medicaid Office, [inaudible] so,

1 we have to work with them, with their system and we're
2 integrating services into their system. So it has to be a
3 partnership with our stakeholders, families, people that we
4 serve, but also with our Medicaid Office, because that's where
5 we're [inaudible].

6 SPEAKER: [inaudible]. It is important to know that
7 most of our participants and our services are funded through
8 Medicaid.

9 DAVIS: Yes sir.

10 SPEAKER: Yes. You have been [inaudible] level of
11 effort on Section 2.3.2, it's talking about not to exceed 500
12 hours per contract [inaudible]. And then in the following
13 [inaudible], 2.3.2.3.4, it talks about 1,000 hour limit. Are
14 these two separate limits or-

15 SPEAKER: [inaudible].

16 SPEAKER: Okay. So, they're the same?

17 SPEAKER: For 2.3.2?

18 SPEAKER: Yes.

19 SPEAKER: Yes, [inaudible].

20 DEMBROW: Thank you for noting that, we'll issue an
21 amendment.

22 DAVIS: Yes.

23 SPEAKER: So, would this be considered part-time
24 work?

25 SPEAKER: No. [inaudible]

1 SPEAKER: Based on the hours and the financial
2 [inaudible] true hours?

3 SPEAKER: So, what we envision is certainly for your
4 project manager, I mean—when the hours were developed, the
5 vision, now this may not be an accurate vision, this is where we
6 need your input—with that, you know, maybe it would be a team of
7 people that might be working on all three of the major areas.
8 One might be more—one might spend more time on one area than
9 another; but actually, we're really looking for full time bodies.
10 It seems to be really difficult to do anything part time.

11 SPEAKER: Okay. So, [inaudible] full time,
12 [inaudible] hours?

13 SPEAKER: Considered full time 2,080.

14 DAVIS: 2,080, yeah. 2,080. And, the financial
15 proposal form is estimation and they are for evaluation purposes
16 [inaudible]. Yes sir.

17 SPEAKER: [inaudible] still in development?

18 SPEAKER: I couldn't hear the question.

19 SPEAKER: [inaudible] in development?

20 SPEAKER: [crosstalk] Yes. It's been [inaudible]
21 and that's not with us, it's with Medicaid.

22 SPEAKER: Yeah.

23 SPEAKER: Is FEI Systems.

24 DAVIS: Right.

25 [crosstalk]

1 DAVIS: FEI Systems. Well, FEI Systems.

2 SPEAKER: What is the [inaudible] time that you would
3 [inaudible].

4 DAVIS: So, we have not built that in. As I said,
5 this contract needs to start on September 1. We're trying to
6 move as expeditiously as practical. Hopefully trying to get it
7 awarded and into the Board by July 1. Then we'll have that 30-
8 day period and then a 30-day period in August, maybe to
9 transition [inaudible] not awarded, [inaudible] transition
10 period. So that's why we're trying to move it and not do a lot
11 of extensions that kind of thing.

12 SPEAKER: Thank you.

13 DAVIS: Go ahead.

14 SPEAKER: So, to that point, I want to [inaudible] at
15 that point, Release 1 will have occurred and we'll be working
16 first to intra-releases and then working for Release 2. I
17 [inaudible] fairly tight and aggressive timeline for the design
18 and development work. That's essentially what you'll be
19 assisting us with. So, the expectations would be [inaudible]
20 fairly quickly, [inaudible].

21 DAVIS: Yes ma'am.

22 FULTON: Sherron Fulton, [inaudible]. Evaluating
23 the proposal, looking for the value [inaudible].

24 DAVIS: It's the best advantageous to the State and
25 Technical has greater weight than Financial proposals.

1 SPEAKER: [inaudible]

2 SPEAKER: [inaudible]

3 DAVIS: 2.3.4, and you said the project manager?

4 SPEAKER: [inaudible]

5 [crosstalk]

6 SPEAKER: So, I didn't really hear your question.

7 [inaudible] was the question?

8 SPEAKER: [inaudible] You're saying this portion is

9 [inaudible] required, that means it's a part-time position.

10 That's what my understanding is, but you're saying you need full
11 time people [inaudible].

12 SPEAKER: For the project manager.

13 SPEAKER: For the project manager, for the other team
14 members. [inaudible] be coming in and out, I would imagine. You
15 know, [inaudible] as needed because they may not be needed every
16 day but might be needed at different points of the project.

17 DAVIS: So, as you read the staffing [inaudible]
18 there's four key personnel. It may be a team of people that
19 you're proposing may be submitted. But, [inaudible] and the
20 evaluator [inaudible] that we had on the financial proposal forms
21 is what is going to drive the procurement.

22 SPEAKER: [inaudible]

23 DAVIS: Onsite.

24 SPEAKER: Onsite.

25 DAVIS: Onsite. Yes sir.

1 SPEAKER: What do you anticipate that they're going
2 to be responsible for creating the UAT test plan, coordination of
3 UAT and then fund [inaudible] or is that something that you're
4 developing—

5 DAVIS: Development.

6 SPEAKER: So, the IT vendor has been handling the
7 [inaudible] and scheduling that, but we do work closely—the
8 contractor would be expected to, you know, review documents,
9 [inaudible] documents and to work very closely with [inaudible],
10 very closely with our training components.

11 SPEAKER: Thank you.

12 DAVIS: I'm sorry, I saw your hand first, did you
13 have your hand up? Okay. Yes sir.

14 SPEAKER: So, [inaudible] not be selected and I know
15 there's a 30-day transition period for knowledge transfer. I
16 also know that [inaudible] can be very, very tricky sometimes.
17 Would you all be willing to have the selected vendor come in
18 before their start time to view the process of rollout, this
19 first go out and—

20 DAVIS: Absolutely.

21 SPEAKER: --in order to kind of pick up September 1st,
22 to do the [inaudible] roll out.

23 DAVIS: Once the contract is awarded and it's
24 approved at the Board of Public Works, the selected vendor can
25 come in, although you can't [inaudible] until the actual project,

1 you can come in and get the institutional knowledge at that time,
2 that you may need.

3 SPEAKER: Thanks.

4 DAVIS: Yes ma'am.

5 SPEAKER: [inaudible]

6 DAVIS: No ma'am.

7 SPEAKER: Okay.

8 DAVIS: Yes.

9 SPEAKER: My question is, the current vendor,
10 [inaudible] have they kept their documentation up to date?

11 DAVIS: Yeah.

12 SPEAKER: Oh yeah.

13 DAVIS: Yeah, I'm sure that they have, it's a
14 requirement.

15 SPEAKER: Yes.

16 SPEAKER: Okay.

17 DAVIS: Yes sir.

18 SPEAKER: How soon will you be sending a list of all
19 the people that attended this meeting?

20 DAVIS: The minutes, hopefully will be out by the
21 end of next week. We're hoping to have the minutes and any
22 questions that we can answer posted at that time as well. As I
23 said, we're on a fast track and we're trying to get it done
24 quickly.

25

1 DEMBROW: Additional questions in writing are due
2 April 2nd.

3 DAVIS: I do have questions, as I said, I looked at
4 the questions this morning. We're going to respond to those and
5 try to have everything that we can answer by next week and any
6 additional questions will be answered as quickly as possible.
7 Yes sir.

8 SPEAKER: Are you able to share who the minority
9 contractor is [inaudible]

10 DAVIS: We don't have an MBE for the current
11 contract. There isn't one.

12 SPEAKER: Thank you.

13 DAVIS: You're welcome. Yes ma'am.

14 SPEAKER: [inaudible] FBI is the [inaudible]
15 documentation, so [inaudible] right here and where can we get
16 that [inaudible]

17 SPEAKER: I'm not sure I'm clear on the question.

18 [crosstalk]

19 SPEAKER: I mean, what specifically do you want? I
20 mean, this has been around though, prior to 2-3 years.

21 [crosstalk]

22 SPEAKER: So, I need you to be more specific. We
23 have to look at it, but [inaudible] all of it is not—that's
24 pretty global and I don't know what that means.

25

1 SPEAKER: Okay. So, is there anywhere—is there
2 anywhere I can access that information—

3 SPEAKER: No, no.

4 [crosstalk]

5 SPEAKER: --just checking to see if there's
6 documentation up to this point that we can access [inaudible].

7 SPEAKER: There is documentation. There are past
8 schedules, meeting notes. Multiple past schedules. [inaudible]

9 DAVIS: Can you send your questions to the
10 Solicitation Email and let us review your exact questions and
11 then we'll respond.

12 [crosstalk]

13 SPEAKER: --it's not what you want.

14 DAVIS: Yes ma'am.

15 SPEAKER: [inaudible]

16 DAVIS: If we can get any lessons learned or
17 [inaudible], so whatever documentation that is available that we
18 can share, we will. Like I said, send your questions and we will
19 talk to the [inaudible] vendor for the development and find out
20 what they have as well. Yes ma'am. Sure.

21 SPEAKER: Yes, I want to be very, very clear,
22 [inaudible] project plan.

23 DAVIS: Well no, we can't share a project plan.
24 You can certainly ask [crosstalk] right, right. We can't share a
25 current vendor's project plan or anything of that nature.

1 SPEAKER: Okay.

2 [crosstalk]

3 SPEAKER: [inaudible]

4 DAVIS: Like I said, please email your questions,
5 send it to us and we will share it with [inaudible] and we'll
6 determine what can be shared and what cannot.

7 SPEAKER: [inaudible]

8 SPEAKER: [inaudible] -each section that we go
9 forward in each of the [inaudible] that we have. So, [inaudible]
10 that's project management team has been able to meet expectations
11 [inaudible].

12 SPEAKER: [inaudible]

13 DAVIS: And, like we said, it's an ongoing process,
14 so it's ongoing. Yes.

15 SPEAKER: [inaudible] I'm not sure that the
16 [inaudible] -coming in after that, that there's some knowledge
17 [inaudible] does not have. [inaudible]

18 DAVIS: So-

19 [crosstalk]

20 DAVIS: And the Department is aware that
21 [inaudible] is a huge thing to overcome and we don't have a lot
22 of control over [inaudible]. What we can do is make sure that
23 the evaluation of the procurement-make sure that the evaluation
24 process is fair and that whatever we can share, we will share.
25 If we can't share it, we'll let you know that.

1 DEMBROW: There's no advantage to incumbency except
2 the fact that it's indispensable that they haven't done it.

3 DAVIS: Done it, right.

4 [crosstalk]

5 DEMBROW: You may have better knowledge, as an
6 incumbent, you may have better knowledge of our needs. If you
7 demonstrate that, you will be selected over the incumbent. The
8 incumbent, naturally because they're there has a certain degree
9 of knowledge.

10 SPEAKER: [inaudible]

11 [crosstalk]

12 DAVIS: Any more questions? And if you have any
13 more questions, like I said, you have up until Monday to get them
14 to me. We'll be happy to answer them as quickly as we can.

15 [crosstalk]

16 DAVIS: I thank you all for coming. Oh, before
17 everyone leaves. Before you all leave, if I could just have the
18 MBE and VSBEs to stay, so if there are any primes here, they can
19 see who you are and you guys can—MBEs raise your hand and thank
20 you very much, you're a VSBE? Okay.

21 [crosstalk]

22 DAVIS: Thank you so much.

23 [end of audio]

24

25