



**DEPARTMENT OF
INFORMATION TECHNOLOGY**

**Consulting and Technical Services II
Request for Proposals
Pre-Proposal Conference**

October 8, 2008





Agenda

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| Overview | Stacia L. Cropper Director, Strategic Planning |
| RFP Review..... | Gisela Blades Procurement Officer |
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Introduction

Elliot H. Schlanger
Secretary, DoIT

CATS I Goals

- Open the door for more companies to do business in Maryland
- Provide viable opportunities for small and minority businesses
- Diversify State business across more companies
- Ensure market pricing for the State
- Provide more flexibility in terms and conditions
- Reduce the time it takes to buy services

CATS I Results

- 236 Proposals resulted in 217 Master Contractors
- 87 Prime Contractors are MBEs
 - \$111,235,246.32 (50.4%) Total dollars awarded
- 61 Prime Contractors are SBRs
 - \$37,485,823.38 (17%) Total dollars awarded
- 166 awards to 65 Master Contractors
- The Limitation of Liability (LoL) was capped at five times the Task Order value at the Master Contract level, but the actual LoL is determined at the Task Order level, based on requirements
- The average solicitation time went from one year to 120 days

Lessons Learned

- The solicitation process for some types of services is still too burdensome and takes too long
- Some terms and conditions still cause some companies not to aggressively pursue State business
- Some services were not available under CATS I
- There is not a high level of consistency across agencies for writing scopes of work, setting terms and conditions, and evaluating proposals

Applying Those Lessons

- Request for Resumes (RFR)
 - In addition to the task order RFP process used for CATS I, CATS II includes this new RFR process to procure certain types of resources very quickly
 - The process can take as little as a week or two
- Intellectual Property (IP) Rights
 - The CATS II Master Contract provides flexibility for modifying the IP rights at the task order level
- Two New Functional Areas (FA)
 - Tower Installation
 - Tower Equipment Installation and Services

Applying Those Lessons, cont.

- Additional Frameworks and Guidelines
 - DoIT will be working with the agencies to identify best practices for setting limitations of liability for similar contracts
 - Additional tools are being developed to assist agencies in writing scopes of work, including examples of
 - Technical and functional requirements
 - Deliverables definition and acceptance criteria
 - Reporting requirements

Applying Those Lessons, cont.

- Additional Frameworks and Guidelines, cont.
 - The CATS II procedures will include more defined criteria for appropriate evaluation standards
 - No short-listing of proposal submissions
 - Mandatory oral presentations
 - Provide opportunity to cure proposal deficiencies
- As we learn more lessons, we will apply them.
- We look forward to hearing from you and to continued success with CATS II.



Overview

Stacia L. Cropper
Director, Strategic Planning

TORFP Process References

- See the CATS I Master Contract page for FAQs relating to the TORFP process
 - www.maryland.gov search: CATS
- A contract kickoff meeting will be held once the CATS II Master Contracts are awarded to address all questions about the task order and RFR processes
 - To see the presentations from the CATS I kickoff meeting, go to:
<http://doit.maryland.gov/contracts/Pages/CATSConference.aspx>

The Basics

- Like CATS I, CATS II will have unlimited Master Contract awards
- MBE and SBRs are encouraged to propose as Master Contractors
- There are no limits to how many MBE or SBR companies can become Master Contractors
- As a Master Contractor, each company under a FA is guaranteed an opportunity to propose for work proposed under that FA

The Basics, cont.

- There is no guarantee that, as a Master Contractor, your company will receive a task order award or an RFR award
- The CATS II Master Contract will have a web page similar to the CATS I page, listing all Master Contractors, task order awards and RFR awards

The Basics, cont.

- The examples under the FAs are just that – examples. They are not Statements of Work. Offerors need not provide all of the example services listed. Only one is necessary to propose to that FA.

Questions About Questions

- All questions that have been submitted to date and those asked here today will be answered in writing in the official Questions and Answers document.
- Some of those questions – the ones that are asked most often - are included in this presentation.
- Only the written answers in the Questions and Answers document can be considered official.

Frequently Asked Questions

- Is the State considering modifying any other Terms and Conditions for CATS II?
 - All requests are being considered. Any further modifications would be issued in an amendment to the RFP.

Frequently Asked Questions

- What happens to the CATS I contract once CATS II is awarded?
 - The CATS I Master Contract and the task orders awarded under CATS I will continue through the CATS I expiration date in December 2010.
 - Until CATS I expires, CATS II will be used for
 - Task orders with timelines that will extend past the expiration date of CATS I,
 - Task orders for the FAs that are not on CATS I and
 - RFRs.

Frequently Asked Questions, cont.

- What happens if work under an existing CATS I task order is incomplete at the end of the Master Contract?
 - No extensions will be permitted. The remaining work will have to be competed under CATS II or other procurement vehicle.
- Will Master Contractors on CATS I automatically become CATS II Master Contractors?
 - No. CATS I Master Contractors will need to submit proposals for evaluation to become Master Contractors on CATS II.

Frequently Asked Questions, cont.

- Does the State provide a listing of the CATS I Master Contractors (Incumbents)?
 - Yes. The complete list is on the CATS I web site.
- What is the contract value of CATS I?
 - The State has a spending authorization of up to \$350M of which approximately \$220M has been awarded to date
- What will be the contract value of CATS II?
 - The CATS II contract value will be determined prior to award.

Frequently Asked Questions, cont.

- Is it possible to become a CATS II Master Contractor during the life of the contract?
 - No. Master Contract awards will be made only once during the life of the CATS II contract.
 - It will not be possible to become a new Master Contractor until the CATS II contract replacement is awarded.

Frequently Asked Questions, cont.

- I have a very small company in a niche market. Does it make sense for us to try to become a Master Contractor on CATS II? Isn't it complicated?
 - Yes. It makes sense to submit a proposal. Offerors may propose to be represented in as few as 1 or as many as all 17 FAs.
 - Being on a Master Contract means that you will have the flexibility to choose the opportunities that suit your business model.
 - No, it is not complicated. (See RFP Review).

Frequently Asked Questions, cont.

- Do I have to supply rates for all of the labor categories?
 - It is not required.
 - However, if rates are not provided at the Master Contract level, the Master Contractor will not be permitted to use those labor categories.
 - Remember, the Master Contractor rates are a maximum.

Frequently Asked Questions, cont.

- Do I have to establish my MBE partnerships at the Master Contract level?
 - No. MBE partnerships do not apply at the Master Contract level.
 - Awarded Master Contractors will establish MBE partnerships for each individual TORFP/RFR to which they propose, when required.

Do's and Don'ts

- **Don't** be late. Your proposal must be submitted no later than 2:00 pm on November 5th to be eligible for evaluation. Proposals submitted after the due date and time will be rejected.
- **Don't** waste money sending us valuable marketing materials. They will not be considered in the evaluation and will be discarded.
- **Do** submit the D-1 Master Contractor Acknowledgement of Task Order MBE Requirements form with your proposal. If you do not, your proposal will be rejected.
- **Don't** talk with anyone else at DoIT about this RFP except the Procurement Officer, Gisela Blades.



RFP Review

Gisela Blades
Procurement Officer

Important Note

This review addresses salient points of the RFP only. It is of utmost importance that all who aspire to be awarded a master contract, be well versed with the entire content of the RFP, including attachments, since these documents will be incorporated in the final master contract and as such, will be enforced.

Proposal Submission

Section 3

- Proposal Registration Form
 - Available November 1
- Transmittal Letter
- Executive Summary
- Offeror General Information
- Past Performance
- Insurance

Proposal Submission, cont.

Section 3

- Attachments
 - Attachment B - Completed Bid/Proposal Affidavit
 - Attachment D-1 Offeror – Completed, signed and unedited: Offeror MBE Form – Offeror Acknowledgement of TORFP MBE Participation Commitment
 - Attachment I – Completed Living Wage Affidavit
- Financial Proposal - separate

Communication

(Sections i, iii)

- All future communication about the CATS II RFP will be posted on the CATS II procurement web site:

<http://doit.maryland.gov/contracts/Pages/CATSIIrfp.aspx>

and eMarylandMarketplace

<https://ebidmarketplace.com/>

- There will be NO further direct distribution of any kind, be it revision to the RFP, updates, summations, addenda, etc.

Functional Areas

(Section 1.1.2)

- There are 17 Functional Areas
- Two new areas have been added – FA 13 and FA 14, both pertaining to building Towers
- Vendors/Offerors may propose to one, several or all functional areas
- There is no limit to awards per or by functional area

eMarylandMarketplace (eMM) (Section 1.9)

- All Offerors must be registered/subscribe to eMM prior to award
- Look at eMM for all updates pertaining to this procurement

MBE Goal

(Section 1.24)

- A minimum overall MBE subcontractor participation goal of **35%** has been established for the aggregate of all TO Agreements awarded under CATS II – a 5% increase over CATS I
- The State shall assess the potential for an MBE subcontractor participation goal for each TORFP/RFR issued, including any TORFP/RFR designated as a Small Business Reserve, and shall set a goal, if appropriate

MBE Forms

(Section 1.24)

- **It is IMPERATIVE** that each Offeror **complete, sign and submit, without edits, Attachment D-1 Offeror** (Offeror MBE Form – Offeror Acknowledgement of TORFP MBE Participation Commitment) at the time it submits its technical response to the RFP
- **Failure to do so will result in the State's rejection of the Offeror's Proposal to the RFP with no opportunity for cure.**

MBE TORFP/RFR Level

- Master Contract MBE reporting procedures will be addressed at the Master Contract kick-off meeting
- An MBE prime contractor must subcontract with another MBE to fulfill an MBE goal.

MBE TORFP/RFR Level, cont.

- **It is IMPERATIVE** that Master Contractors responding to a TORFP/RFR containing an MBE goal complete, sign, without edits, and submit all required MBE documentation (TO Attachments D-1 (Certified MBE Utilization and Fair Solicitation Affidavit) and D-2 (MBE Participation Schedule) at the time of TO Proposal submission. Failure to do so will result in the State's rejection of the Master Contractor's proposal to the TORFP

SBR Participation

(Section 1.25)

- The State reserves the right to designate any qualifying TORFP/RFR issued pursuant to this RFP as an SBR-only TORFP/RFR.
- The resulting TO Agreement may only be awarded to a Master Contractor that is certified as a Small Business under the Department of General Services SBR Program.
- Throughout the term of the Master Contract, Master Contractors qualifying or disqualifying under SBR guidelines shall notify the CATS II Contract Manager of a change in status.

Living Wage (Section 1.26)

- The Living Wage requirement:
 - Determined at the TORFP/RFR level
 - Sets minimum hourly rates at \$8.50 or \$11.50, depending on location of services rendered
 - Mandatory reporting for each TORFP/RFR (Attachment H)
 - Master Contractors responding to a TORFP/RFR will be required to submit and complete the Living Wage Affidavit (Attachment I) with their response

Prompt Pay (Section 1.35)

- Each contract/TO Agreement to be awarded pursuant to this solicitation is subject to the Prompt Payment Policy Directive issued by the Governor's Office of Minority Affairs (GOMA) dated August 1, 2008
- Master Contractors under this RFP must comply with the prompt payment requirements outlined in the Contract, §32 (see Attachment A)
- Additional information is available on the GOMA website at <http://www.goma.state.md.us/>

Secondary Competition – TORFP

(Section 2.3)

- A TORFP is structured like a much smaller version of a standard RFP. For sample TORFPs, see CATS I web site: www.maryland.gov search: CATS
- A TORFP specifies a particular statement of work, a specific MBE goal or SBR assignment, and any other special conditions that apply. At that time Master Contractors submitting proposals will select a specific MBE partner in order to satisfy the MBE requirement, if indicated

Secondary Competition – RFR

(Section 2.3)

- The RFR option streamlines the secondary competition process by allowing the acquisition of temporary resources in specific instances:
 - From one to five staff on a single RFR may be engaged for up to six months without renewal options
 - A single Project Manager for a designated Major IT Development Project may be acquired through the end of the project within the Master Contract term
- An RFR is limited to the labor categories defined in the RFP.



Questions and Answers

The Panel