



DEPARTMENT OF GENERAL SERVICES

PBX IV
001B0600162
Master Contractor
Kick-Off Conference

September 4, 2020



Agenda

- Introductions:
 - Contract Manager
 - Procurement Officer
- Contract Specifics
- General Instructions
- Master Contractor Administration System
- Do's and Don'ts
- Questions

Introductions

- Technical Contract Manager
 - Alan Sabol
 - Department of Information Technology
 - 100 Community Place
 - Crownsville, Maryland 21032
 - Phone Number: (410) 697-9695
 - Email: alan.sabol@maryland.gov
- Procurement Officer
 - Dominic Edet
 - Department of General Services
 - 45 Calvert Street, 2nd Floor
 - Annapolis, Maryland 21401
 - Phone Number: 410-697-9723
 - Email: dominic.edet2@maryland.gov

DoIT may change the Contract Manager and/or the Procurement Officer at any time by written notice to the Master Contractors.

Contract Specifics

- Contract Dates
- Warranty
- Forms
- Proposals
- Maintenance
- MBE goals

Contract Specifics – Contract Dates

Effective Contract Date:

January 1, 2021 – December 31, 2030

Contract Specifics - Warranty

- An agency may specify a warranty period that extends beyond the manufacturer's standard warranty period.
- The warranty period will begin upon System Acceptance by Agency
- Unless otherwise specified in the PORFP, the service level for a repair under warranty that is not otherwise on a maintenance contract is at a level as specified by the Agency.

Contract Specifics – Warranty – cont'd

- The warranty, at a minimum, will cover **at no additional cost to the State**, the following:
 - Defects in workmanship and materials under normal use
 - Parts, service, and transportation required for repair or normal maintenance
 - All cables, inside wires, terminals and all auxiliary (at a minimum to include batteries and rectifiers) equipment supplied by or utilized by the Contractor
 - Replacement or repair of defective equipment, applications and operating systems

Contract Specifics – Forms

- Mercury Affidavit
 - (Required with each PORFP Response)
- Functional Area 2 & 3 – MBE and VSBE Documentation
 - Required with each PORFP Response
- Attachment D-1: Certified MBE Utilization and Fair Solicitation
- Attachment D-2: MBE Participation Schedule
- VSBE Utilization Affidavit and Prime/Subcontractor Participation Schedule
 - <https://doit.maryland.gov/contracts/Pages/PBXIVMBEParticipation.aspx>
 - <http://procurement.maryland.gov/wp-content/uploads/sites/12/2018/04/AttachmentE-VSBEForms.pdf>
- Failure to complete and sign these forms will result in the State's rejection of the PORPF Proposal

Contract Specific - Proposals

- Be Aware:



- If you provide specifications for a proposal, you are prohibited from bidding on the proposal

Contract Specific - Proposals – cont'd

- You cannot make substitutions:
 - If a specific item is requested and you do not sell it
 - If a specific item is no longer available, you should notify the PO Procurement Officer ask for an amendment
- For all PORFPs, the Master Contractor **MUST** submit:
 - MSRP Documentation, from each manufacturer providing any resources to the bid, which must meet one of the three following DoIT Contract Requirements:
 - MSRP documentation printed on Manufacturer Letterhead
 - Confirming email from Manufacturer Rep confirming all MSRP prices on an attached quote are accurate
 - Manufacturer's Webpage screen shot, with website address included and legible on the document

Contract Specific - Proposals – cont'd

- For all PORFPs, the Master Contractor **MUST** submit:
 - Separate Technical and Financial Proposals

Contract Specific – Proposals - cont'd

- Technical Proposal
 - Must be labeled “**PORFP #, PORFP Title, Technical Proposal**”
 - Term must not extend beyond the termination date of the existing contract at time proposal is submitted
 - Be organized, concise, unambiguous, and omit non-relevant information
 - Eliminate potential for misinterpretation
 - Conform with all requirements of the PORFP
 - Submit attachments requiring a signature in .pdf format

Contract Specific – Proposals - cont'd

- Financial Proposal
 - Must be labeled “**PORFP #, PORFP Title, Financial Proposal**”
 - Must include MSRP documentation for all manufacturers included in the proposal
 - Must be inclusive of hardware warranty **shown as a separate line item**
 - **Must be inclusive of software warranty shown as a separate line item**

Contract Specifics – Maintenance

- Maintenance service level(s) will be specified by the requesting Agency
 - Terms of coverage
 - Period of coverage

Contract Specifics – MBE-VSBE Goals

- Functional Area 1 – Hardware, Associated Peripherals and Software:
MBE Goal 0% - VSBE Goal 0%
- Functional Area 2 – Manufacturer’s Extended Warranty and Maintenance Services:
MBE Goal 25% - VSBE Goal 2%
 - Extended Warranty excluded from MBE and VSBE goals
- Functional Area 3 – Time and Material Labor:
MBE Goal 25% - VSBE Goal 2%

Purchase Order Request for Proposals Process

- Step 1 – Receipt of the PORFP
- Step 2 - PORFP Proposal Preparation
- Step 3 - Proposal Formulation
- Step 4 - Proposal Submission
- Step 5 - Evaluation of Technical PORFP Proposals
- Step 6 – Evaluation of Financial PORFP Proposals
- Step 7 - Award of the PORFP
- Step 8 - Post Award Activities

Step 1 – Receipt of the PORFP

- The requesting agency emails the PORFP directly to all MCs that meet the manufacturer and functional area requirements or either all contractors
- Once the MC receives the PORFP, the PO Procurement Officer becomes the sole point of contact for that PORFP

Step 2 - PO Proposal Preparation

- Review the PORFP and assess if submitting a proposal suits your business needs
- If not submitting a proposal, the MC must submit the [Procurement Feedback Form](#). This information helps us monitor the quality of the solicitation
- The MC must express concerns, over requirements in the PORFP, to the PO Procurement Officer, prior to the due date for submission of proposals, in order to be considered

Step 2 - PO Proposal Preparation - cont'd

- We strongly urge all interested MCs to:
 - Read the entire PORFP (including attachments)
 - Formulate questions to ask prior to the proposal due date
 - Form Minority Business Enterprise (MBE) partnerships for services provided in Functional Areas 2 & 3
- Ensure that you have submitted a signed Letter of Authorization for all manufacturers' equipment (including peripherals) that you may propose.

Step 3 - Proposal Formulation

- Submit Separate Technical and Financial Proposals
 - Include all required documentation:
 - MBE Documentation (D1 & D2), and VSBE Utilization Affidavit and Prime/Subcontractor Participation Schedule – Completed with authorized Signature for Functional Areas 2 & 3 (**Failure will result in the rejection of the PO Proposal**)
 - MSRP Documentation – For each manufacturer that is included in the proposal
Must meet one of the following three DoIT Contract Requirements:
 - MSRP documentation printed on Manufacturer Letterhead
 - Confirming email from Manufacturer Rep confirming all MSRP prices on an attached quote are accurate
 - Manufacturer’s Webpage screen shot, with website address (URL) included and legible on the document
 - Submit using proper file formats:
 - MS Word for Technical and MS Excel for Financial
 - Submit any attachments requiring a signature in .pdf format

Step 3 - Proposal Formulation – cont'd

- Technical Proposal
 - Must be labeled “**PORFP #, PORFP Title, Technical Proposal**”
 - Must include all required MBE documentation for Functional Areas 2 & 3 (MBE Forms D-1 and D-2). **Failure to submit this documentation completed and signed at the time of submission will result in the State’s rejection of the PO Proposal**
 - Must not extend beyond the termination date of the existing contract at time proposal is submitted

Step 3 - Proposal Formulation – cont'd

- Financial Proposal:
 - Must be labeled “**PORFP #, PORFP Title, Financial Proposal**”
 - Pricing must include all price information associated with performing all of the services required in the PORFP
 - Labor rates cannot be higher than those proposed in the Master Contract
 - Cannot include charges or services that extend beyond the termination date of the existing contract at time the proposal is submitted

Step 4 - Proposal Submission

- Submit the PO Proposal:
 - As two separate files in the format specified. Default format is MS Word for Technical, MS Excel for Financial
 - 10MB file size limitation for email, can submit each proposal in a separate email if necessary
 - Early enough to ensure delivery by the required date and time
 - Failure for the submitted proposal to be received by the specified date and time will result in rejection of the PO Proposal
 - To the address or email specified in the PORFP
 - Ask for a receipt or confirmation that the PO Proposal has been received by the required due date and time

Step 5 - Evaluation of Technical Proposals

- The PO Procurement Officer will forward only the technical proposals to the evaluation committee. Technical proposals will be evaluated using the evaluation criteria stated in the PORFP. MCs may be asked to:
 - Provide clarifications
 - Give an oral presentation

Step 5 - Technical Proposals – cont'd

- MCs submitting Technical Proposals deemed not qualified will be notified via email
- Only Financial Proposals of qualified Technical Proposals will be considered
- When the committee has completed the evaluation of those qualified, technical proposals will be ranked (such as one through five), according to the criteria stated in the PORFP

Step 6 – Evaluation of Financial Proposals

- The PO Procurement Officer will distribute the Financial Proposals to the evaluation committee for only those Technical Proposals found qualified
- Financial Proposals will be ranked according to price

Step 6 - Financial Proposals - cont'd

- Master Contractors may be asked to:
 - Attend financial discussions
 - Provide clarifications
 - Submit a Best and Final Offer (BAFO)

Step 7 - Award of the PORFP

- An award will be made to the most advantageous PO Proposal offer, considering technical and financial submissions
- MCs who submitted proposals, but are not receiving the award will be notified of the winning bidder and the price

Step 8 - Post Award Activities

- After award of the PORFP, the MC is responsible for:
 - Providing the services and personnel agreed to and required by the Purchase Order Agreement
 - Following the required project policies, guidelines and methodologies required in the PORFP
 - Submitting invoices to the PO Manager as required by the PORFP
 - Complying with Contract Management Oversight requirements

Step 8 - Post Award Activities – cont'd

- Complying with the MBE/VSBE goal set forth in the Purchase Order Agreement.
- Submitting monthly MBE/VSBE reports to the PO Manager and PO Procurement Officer, as required by Attachment 2 - MBE Forms, PO Contractor MBE Report Requirements:
 - MBE Form D-5, MBE Participation PO Contractor Paid/Unpaid Invoice Report
 - MBE Form D-6, MBE Participation Subcontractor Paid/Unpaid Invoice Report

<https://doit.maryland.gov/contracts/Pages/PBXIVMBEParticipation.aspx.aspx>

<http://procurement.maryland.gov/wp-content/uploads/sites/12/2018/04/AttachmentE-VSBEForms.pdf>

MC Admin System

- Each Master Contractor is solely responsible for maintaining current and accurate contact information for their company
 - Each new MC's Admin Contact will be sent a username and temporary password
 - Existing MC's should use their current login and password
 - Each MC will have only one individual to update contact information
 - Changes to your MC contact information can be made at any time, "24/7"

PLEASE DO

- Update the PBX IV Master Contractor pages on the web site as needed
 - Expired contact information could result in not receiving PORFPs
 - Submit the electronic Procurement Feedback Form
 - Must be used when you choose not to bid
- Read the entire PORFP, including all attachments
- Be specific and provide details when responding to how you will meet the requirements stated in the PORFP
 - “Will comply” or “Will meet these requirements” can be evaluated as non-responsive

PLEASE DO

- Communicate only with the PO Procurement Officer during the PORFP process
 - Ask questions prior to submitting PO Proposals
 - Address any Conflicts of Interest prior to and when submitting a PO Proposal
- Have MBE/VSBE relationships established before submitting a PO Proposal
- Follow required PO Proposal response format
 - Provide separate technical and financial proposals
 - Submit completed MBE Forms D-1 and D-2 with authorized signature along with the PO Proposal for Functional Areas 2 & 3
 - Submit completed VSBE Utilization Affidavit and Prime/Subcontractor Participation Schedule for Functional Area 2 & 3
 - Submit Mercury Affidavit with the PO Proposal For all Functional Areas

PLEASE DO NOT

- Contact other State personnel concerning a PORFP
- Submit a late PO Proposal
- Submit an alternate PO Proposal
- Submit marketing materials
- Perform any work not specified in the PORFP scope, unless a change order is executed by the PO Procurement Officer first
- Assume anything

Questions?