PRE-PROPOSAL CONFERENCE
REQUEST FOR PROPOSALS
DISABILITY BENEFITS ADVOCACY PROJECT
OBF/CARM/14-002-S

OCTOBER 21, 2014

311 West Saratoga Street
Room 104
Baltimore, Maryland

9:30 a.m. - 10:40 a.m.

PRESENT FROM DHR:

JAMES REDDITT,  Procurement Officer

VINCE KILDUFF

GREG SILEO

DONNA FOSTER

DANIKA MONTAGUE

ELSA SINGLETON

ADOLPHE ANJOU

JILL TAYLOR

CYNTHIA CRAWLEY-FOX

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BOB MCENROE

JACQUELINE STANTON

EDWARD ROCK

J. GREGORY HOLLAND

DEBORAH AUSTIN

SCOTT MOORE

ZINA HAMLET

OTHERS PRESENT:

PATRICK COAKLEY, PCG Human Services

CAITLYN MEYER, Prince George’s County Human Services

CHARLES E. COOKS, Galaxy Consulting

JEFF BYRNE, BACIL

VIJAY REDDY, ICFI

TORI ABBOTT, The Robertson Group

EDNA MADDEN, Disability Applications & Appeals

WILLIAM NORBECK
MARK E. ELVIN, Maximum
FATEEN J. BULLOCK, Maximus
JOSEPH S. CONLEY, SQN Systems

PRESENT VIA TELEPHONE CONFERENCE:

CHENG LEE
GUS ADAMS
SHERRY CAMPANELLI
DAYCE MOORE

REPORTED BY: KATHLEEN A. COYLE, Notary Public
MR. REDDITT: My name is James Redditt, and I would like to welcome you to the Department of Human Resources. Today we’ll be sharing information concerning the request for proposals entitled disability benefits advocacy project. The agency control number for this solicitation 0BF/CARM/14-002-S. If you have not already done so, I ask that you would please sign in at the back table so we can keep an account of everyone who attends the conference. When you sign in please indicate if your agency is a MBE, SDR, or DSBE because the Department likes to track the participation of these companies in a procurement opportunity. If you have a business card, that can satisfy the sign-in requirement.

Please note that Hunt Reporting is transcribing this conference. Once the conference is

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over a copy of the transcript will be published on eMaryland Marketplace and the DHR website.

At this time we’d like to do introductions of everyone that’s in attendance. We’re going to begin with the representatives of the State, and then we’re going to ask the representatives of the vendor community to identify themselves. Again, my name is James Redditt, and I’m the procurement officer. And I’ll go to the head table and go around here. And then we’ll start right here in the front.

MS. FOX: Good morning. My name is Cynthia Crawley-Fox.

MS. TAYLOR: I’m Jill Taylor from the Special Services Administration.

MS. FOSTER: Donna Foster, Minority Business Enterprise.

MS. STANTON: Jackie Stanton.

MS. SINGLETON: Good morning. Elsa
Singleton, procurement division.

MR. ANJOU: Adolphe Anjou.

MS. MONTAGUE: Danika Montague, DHR Procurement.

MR. SILEO: Greg Sileo, Office of the Secretary.

MR. HOLLAND: Greg Holland, Procurement Compliance.

MR. MCENROE: Bob McEnroe, and I’m the supervisor in Federal Funding.

MR. REDDITT: Okay. And we’ll start with the vendors, please.

MR. COOK: Good morning. I’m Charles Cook with Galaxy Consulting, small disadvantaged business, MBE and DSD certified.

MS. ABBOTT: Tori Abbott with The Robertson Group. We’re a small certified MBE/SBE/DBE and small business reserve program.
MR. ELVIN: Mark Elvin, senior vice president.

MS. HAMLET: I’m not a vendor. I’m Zina Hamlet, Budget and Finance.

Mr. Byrne: Jeff Byrne, Bay Area Center for Independent Living, in Salisbury.

MR. REDDY: Vijay Reddy, ICF.

MR. KILDUFF: Vince Kilduff, State of Maryland, Family Investment.

MR. CONLEY: Joseph Conley with SQN.

MS. MEYER: Caitlyn Meyer with PCG.

MR. COAKLEY: Patrick Coakley with PCG, Public Consulting Group.

MS. MADDEN: Good morning. Edna Madden, Disability Applications and Appeals, MBE/SDAG.

MR. NORBECK: Good morning. William Norbeck.

MR. REDDITT: And who do we have on the
conference call; please identify yourself?

MR. LEE: Hi. This is Cheng Lee from the University of Massachusetts Medical School.

MR. MOORE: Dayce Moore, University of Massachusetts Medical School.

MR. REDDITT: Well, I’d like to thank everyone for attending this conference. At this time I would like to invite Mr. Vince Kilduff, who is the Deputy Executive Director the Family Investment Administration who has some opening remarks for you.

MR. KILDUFF: Okay. I’d like to repeat James’ welcome. It’s good to see you all here. And I just want to cover a little bit of the background. I know there’s a lot to plow through and a lot of acronyms. I thought we had a lot in the welfare world, but I think procurement has got us beat. We’re those that have lived in both worlds, like Elsa.

So we determined that we needed a disability
services contractor to help our disabled public assistance and child welfare recipients who were pursuing SSI or other federal disability benefits. And how we got there was the data were just clear that we were trending towards, you know, growth in the populations of persons that had at least some evidence of disability but who were not receiving federal disability benefits, or if they got them they were taking several years to qualify for.

And I’ll run through some examples. Our temporary cash assistance, or TCA program, the case loads, long-term disabled sub population has doubled since 2007. And the percentage of the benefits of TCA benefits spent on this population or the sub-population rose from eight percent to 17 percent of all of the TANF (phonetic) benefits issued in 2014. And I’ll also note that the TCA for that long-term disabled sub-population are State funded rather than
from the TANF block grant. So naturally it’s high on our radar screen.

Our general assistance program for disabled adults, called TDAP, the case load, well, it stabilized in recent years around 18,000 per month. It’s a very large structural change from 2007 when it was around 11,000 per month. We also have a State funded public assistance program to help people get into assisted living facilities, it’s known as assistance to adults assisted living category. That’s a population that’s doubled not since just 2007, but since 2010. So a sharper growth curve there. And a majority of that growth coming from impaired or disabled individuals without either the Social Security disability or SSI benefits.

So we looked around at work done in other states or in local governments and found some promising results when governments were using
performance based contracts to obtain assistance for their disabled or impaired clients. The models appear to increase the household income for the recipients, save costs for the State or local governments, and also, because of the large populations involved, provide steady work for the contractors.

So that’s a little bit of how we got there. And I just want to personally thank you for your interest in serving our clients. And wish you all the best. Now, I just want to turn it over to James and the team.

MR. REDDITT: Thank you, Vince. Let’s get through the RFP. I’m going to pretty much follow along in the section with the RFP, but there may be some areas where I may have to skip some sections to get to some other information. But most of the majority of the major information in the RFP will be covered through this conference.
First of all, why we’re here? Well, we’re here because the Department is issuing this request for proposal to develop and execute a program to secure SSA title two and title 16 benefits in two functional areas. Functional area one involves obtaining benefits for children placed in foster care; and functional area two involves obtaining benefits for DHR adult customers. The anticipated duration of services to be provided under this contract is three years with one two-year option to be renewed at the State’s sole discretion. The Department intends to make up to two awards, one in each functional area as a result of this RFP. However, a single contractor could possibly be awarded one contract to cover both functional areas.

In section 1.5, the procurement officer for the purposes of this RFP, I am the sole point of contact between the State and the vendor community.
Please do not contact any other State representative regarding any questions about this RFP. Please direct all inquiries to my attention.

Section 1.8 is eMaryland Marketplace. In order to receive a contract award vendors must be registered on eMaryland Marketplace and each offeror is requested to indicate it’s eMaryland Marketplace registration number in the transmittal letter which is submitted at the time of proposal submission.

Section 1.9, questions and responses. We have recently received quite a few questions regarding this RFP prior to the conference. However, time will not allow us to answer those questions at this time. However, please be assured that all responses to all questions that have been submitted will be published on eMaryland Marketplace and the DHR website with sufficient time for the offerors to factor in their responses in their proposal submissions. If any
questions are asked during this conference that are responded to during the conference, those questions and responses will also be published as well. Should there be a discrepancy between a response given here at the conference and the written response that will follow further, the written response shall prevail.

Section 1.11, proposal due date and time. An unbound original and five copies of the technical and financial proposals must be received by me, the procurement officer, by no later than 3:00 p.m., on Monday, December 1, 2014, in order to be considered. Any request for extension of this due date and time will not be granted. Proposals received after the due date and time will not be considered except under the provisions of Code of Maryland Regulation 21.05.03.02 and 21.05.02.10. If you are mailing your proposals please allow sufficient time for mailing to assure that it is received by the due date and time. A post
mark by the due date and time is not acceptable. It must be received by the procurement officer prior to the due date and time. And more information regarding the format of your proposal will be discussed when we get into the discussion about section four.

Section 1.12, the multiple or alternate proposals. Although the Department is accepting proposals for two different functional areas in response to this RFP, multiple or alternate proposals for each functional area will not be accepted. So you need to submit one proposal for the adult functional area and one proposal for the children’s functional area. We cannot accept multiple alternate proposals in one of those functional areas.

Public Information Act known as section 1.14. An offeror should give specific attention to the clear identification of those portions of their proposal that it considers confidential and/or
proprietary commercial information or trade secrets, and provide justification as to why such materials upon request should not be disclosed by the State under the Public Information Act. This confidential and/or proprietary information should be identified by page and section number and placed after the title page and before the table of contents in the technical proposal and, if applicable, separately in the financial proposal. Technical -- I’m sorry. Excuse me. Offerors are advised that upon request for this information from a third party the procurement officer is required to make an independent determination whether the information must be disclosed.

Section 1.25, bid proposal affidavit, which is attachment “B” of your RFP. This form must be completely filled out and submitted with your technical proposal. You only need to submit it with the original of the technical proposal. Copies are
not required. So you don’t have to submit an original and five copies of the bid proposal affidavit, just the one copy that goes and the original proposal is sufficient.

Section 1.26, the contract affidavit. This form is only to be submitted after notification of apparent contract award. So please do not submit this form with your technical proposal.

Section 1.28, verification and registration and tax payment. Before a business entity can do business with the State it must be registered with the State Department of Assessments and Taxation or SDAT. SDAT is located at the State Office Building, 301 West Preston Street, Room 803, in Baltimore. The SDAT website is listed in that section of the RFP. It is strongly recommended that potential offerors complete registration prior to the due date for receipt of proposal or that you review your registration
information to ensure that it is accurate and up-to-date. And offeror’s failure to do so may result in an otherwise successful proposal being dropped from consideration for contract award.

Section 1.36, the conflict of interest affidavit and disclosure. Offeror shall complete and sign the conflict of interest affidavit and disclosure, which is attachment “I” of your RFP, and submit it with their proposal. All offerors are advised that if a contract is awarded as a result of the solicitation, the successful contractor’s personnel who perform or control work under this contract and each of the participating subcontractor personnel who perform or control work under this contract shall be required to complete agreements substantially similar to attachment “I.”

Section 1.37, the non-disclosure agreement. All offerors are advised that this solicitation and
any resulting contracts are subject to the terms of the non-disclosure agreement, which is contained in the RFP as attachment “J.” This agreement must be provided within 10 business days of notification of proposed contract award. However, in order to expedite processing it is suggested that this document be completed and submitted with the technical proposal.

Section 1.38, the HIPAA business associate agreement. Because of the determination by the Department that the functions to be performed in accordance with this solicitation constitute business associate functions as defined by the Health Insurance Affordability and Accountability Act, or HIPAA, the recommended awardee shall execute a business associate agreement as required by HIPAA regulations under Code of Federal Regulations 45 C.F.R. Section 164-501, and as set forth in attachment “K” of the RFP. This
agreement must be provided within 10 business days of notification of proposed contract award. However, to expedite processing it’s suggested that this document be completed and submitted with your technical proposal. Should the business associate agreement not be submitted upon the expiration of the 10 business day requirement period as required in this solicitation, the procurement officer, upon review of the Office of the Attorney General and approval of the Secretary, may withdraw the recommendation for award and make the award to the responsible offeror with the next highest overall ranked proposal.

Section 1.42, the location of the performance of services disclosure. Offerors are required to complete and submit the location of performance services disclosure, which is listed at attachment “N” in this RFP. This disclosure must be provided with your technical proposal. And again, in
regards to all the forms that I just mentioned, you only have to submit the forms with the original copy of the proposal. The copies for the additional five copies of the proposal will not be required for these forms.

At this time we’re going to discuss the minority business enterprise goal. And for that I’ll have to call upon Donna Foster, who is the MBE Administrator for the Department of Human Resources.

MS. FOSTER: Good morning. Again, I’m Donna Foster, Minority Businesses Enterprise Administrator for the Department of Human Resources. Minority businesses are of course encouraged to respond to this solicitation. And certified MBEs, and I heard a lot of them, are encouraged to network after the pre-proposal conference for as long as the room is available. I will cover the highlights of section 1.33 of this RFP.
Beginning with 1.33. A 25 percent MBE goal has been established for this procurement. In addition, subgoals of seven percent African American, 12 percent Asian American, and 12 percent women. Effective June 2014 certified MBE prime contractors can use up to 50 percent of their own work force to accomplish the overall MBE goal and 100 percent of any one subgoal.

1.33.3. And offeror shall include with this proposal a completed MBE utilization and fair solicitation affidavit, which is attachment D-1A.

There are two parts to this document. The first part, the offeror acknowledges that they plan to meet the goal and the subgoals for this procurement or you’re going to request a waiver in whole or in part of the overall goal or any subgoals. You must choose one or the other. The other part is offerors that plan to request a waiver should review the waiver guidance
attachment, that’s D-1C, which explains good faith documentation to support the request for a waiver. In a nutshell, a good faith documentation reflect the MBEs that you have contacted regarding the solicitation that includes their name, addresses, telephone numbers, what information was provided, how it was provided, any offerors that were rejected and why. It should be noted that if a waiver is denied the offer is rejected. The second part of this form you are to list all of the MBE subcontractors that will be used to meet the MBE goal and subgoals. This includes the prime contractor. There are no dollar amounts on this form. If an offeror fails to submit a completed MBE utilization and fair solicitation affidavit with its proposal, the procurement officer shall determine that the proposal is non-response -- non responsible -- I’m going to get this right -- non-responsive and not responsible,
pause, it’s non-responsive -- because I want to get this right -- is non-responsible and not reasonably susceptible of being selected for award. This information is bolded in your RFP, so please pay close attention to that.

1.33.5. Within 10 days of notification of the apparent awardee or actual award, the following documents are submitted: outreach efforts compliance statement, which is attachment D-2, the MBE prime subcontractor project participation certification, your waiver documentation if a waiver has been indicated on the MBE utilization and fair solicitation affidavit, and any other document required by the procurement officer. Failure to return each completed document within the required time, the procurement officer may determine that the awardee is not responsible and, therefore, not eligible for contract award. If the contract has been awarded, the award is
voidable. Again, this information is bolded in your RFP. Please pay close attention.

1.33.10. The offeror is advised that liquidated damages will apply in the event the contractor fails to comply in good faith with the requirements of the MBE program and pertinent contract provisions. Any questions?

(No response.)

MS. FOSTER: Thank you.

MR. REDDITT: Thank you, Donna. At this time we want to be discussing section 1.34, which is the living wage requirements. And for that we’re going to ask Ms. Danika Montague from the Department of Human Resources to come and discuss the living wage requirements.

MS. MONTAGUE: Good morning. Once again, my name Danika Montague, and I’m with DHR Procurement. I’m going to be reading the Maryland living wage. The
living wage law requires certain contractors and subcontractors to pay minimum wage rates to employees working under certain State service contracts. The solicitation for services under a State contract valued at $100,000 or more may be subject to title 18 State finances and procurement article annotated code of Maryland.

Effective September 26, 2014, contractors and subcontractors subject to the living wage law shall pay each covered employee at least $13.39 per hour if the contract service is valued at 50 percent or more of the total value of the contract to perform in the tier one area. If State contract services valued at 50 percent or more of the total contract value are performed in the tier two area, an offeror shall pay each covered employee at least $10.06 per hour.

The specific living wage rate is determined
by whether the majority of the services take place in the tier one area or a tier two area of the State. The tier one areas are Montgomery, Prince George’s Howard, Anne Arundel and Baltimore County and Baltimore City. The tier two areas are any county in the State not included in the tier one area. If a business has operations in areas with two different wage tiers the rate you pay is determined by the area where 50 percent or more of the total contract value is performed. If the employees who perform the services are not located in either tier one or tier two the living wage rate will be based upon where the majority of the recipients of the service are located. This contract has been determined to be a tier one contract.

Additional information regarding the State’s living wage requirement is contained in attachment “G” and G-1, entitled living wage requirements for
services contract and affidavit of agreement. The affidavit of agreement must be completed and submitted with the original copy of the technical proposal. Failure to complete and submit those living wage affidavits of agreement will result in a determination that the offeror is not responsible. The Maryland living wage law is administered by the Department of Labor, Licensing and Regulation. Additional living wage information pertaining to reporting obligations may be found by going to the Maryland State Department of Labor, Licensing and Regulation website, www.dllr.maryland.gov and clicking on the living wage.

The living wage rates are subject to annual adjustment by DLLR. However, the contractor’s prices under the contract may not change because of any living wage adjustments. Offerors must factor this into their pricing proposal submissions. Thank you.
MR. REDDITT: Thank you very much, Danika.

One of the State’s newest socioeconomic programs is the veteran owned small business enterprise program that was recently instituted last year. And at this time I’m going to call on Ms. Elsa Singleton from the Department of Human Resources to discuss the veteran owned small business enterprise goals.

MS. SINGLETON: Thank you, James. Good morning everyone. I’ve been asked to share information with you regarding the veteran owned small business enterprise program. Now, questions or concerns regarding the VSBE program, subcontractor participation goal must be raised before the due date for submission of proposals.

Let’s start with section 1.41.2, an offeror shall structure its procedures for the performance of the work required in this contract to attempt to achieve the veteran owned small business enterprise
goal as stated in the RFP. If you are awarded the contract you, as the contractor, agree to exercise all good faith effort to carry out the FSBE requirements set forth in this RFP.

We’ll now go to section 1.41.3, the VSBE participation goal. A VSBE subcontracting participation goal of 0.5 percent of the total contract dollar amount has been established for this procurement. When you submit a proposal in response to this RFP you agree that this dollar amount of the contract will be performed by certified veteran owned small business enterprises. You must ensure that any proposed VSBE subcontractors are registered with the Department of Veteran Affairs, the VA, as a certified VSBE in the category for which they will be providing the proposed service. A current directory of certified VSBES is available through the U.S. Department of Veteran Affairs. Their website is
www.vetbiz.gov and look under veterans information pages or the VIP database. The most current up to date information on VSBEs is available via this website. It is important to note that only USVA certified VSBEs may be used to meet the VSBE subcontracting goal.

Section 1.41.4, VSBE solicitation and contract formation. An offeror submitting a proposal in response to this RFP must complete and submit with their proposal attachment -1. That’s the veteran owned small business enterprise utilization and fair solicitation affidavit. It is important that this form is completed and submitted with your technical proposal.

In section one of the affidavit you are to only check one of the two boxes, either you intend to meet the entire goal or you are unable to meet the entire goal and intend to ask for a waiver of the
subcontracting goal in whole or in part. In section four of the affidavit you must complete all boxes for all VSB subcontractors being utilized during the contract period. You will list the name of the VSB firm, the VSBE certification number, the federal ID number, identify the specific VSBE category of the firm, the percentage of the total contract value to be provided by the VSBE and a description of the work to be performed by the VSBE. This work must be directly related to the services required in this RFP. Please also ensure that you sign and date the affidavit on the last page. Please remember that this is an affidavit and your signature indicates under penalty of perjury that the information you give us is true and accurate. Please note that failure to complete and submit this affidavit may result in your proposal being deemed not reasonably susceptible for being selected for award. In other words, if the form is
not returned with your proposal submission, your proposal may be dropped from consideration for contract award.

If you have been notified that your proposal has been selected for apparent award, you must complete and submit additional documentation. For each VSBE subcontractor listed on your utilization and fair solicitation affidavit you must complete attachment M-2, which is the VSBE project participation certification. This is your agreement with the VSBE subcontractor to provide the services described on the VSBE affidavit. These forms must be signed by both the prime contractor and the subcontractor and be returned to the procurement officer within 10 days after notification of apparent award. Failure to do so will result in determination that the offer is not responsible and, therefore, not eligible for contract award.
If on your veteran owned small business enterprise utilization and fair solicitation affidavit you stated your intention to request either a full or a partial waiver, once you have been notified of apparent award you must submit a request for a waiver for that portion of the VSBE subcontracting goal within 10 days after notification of apparent award. This waiver request should include your reasons for not being able to achieve the full VSBE subcontracting goal. You must include with the waiver request your documentation demonstrating a good faith effort to achieve the VSBE goal. Please be advised that waivers are not automatically approved. If a waiver request is not approved, the offeror’s proposal may be dropped from consideration for contract award.

Finally, section 1.41.5, contract administration requirements. During the time of the contract the contractor will complete and submit on a
monthly basis attachment M-3, which is the prime contract paid and unpaid VSBE invoice report. This is a report listing any unpaid invoices over 45 days old received from any VSBE subcontractor, the amount of each invoice, and the reason payment has not been made. In addition, each VSBE subcontractor shall complete and submit attachment “L,” the VSBE subcontractor paid and unpaid invoice report, which is a report that identifies the prime contractor and lists all payments received from the contractor in the preceding 30 days as well as any outstanding invoices and the amount of those invoices. Now, these reports are to be submitted to both the State project manager and the DHR VSBE administrator. There are also requirements for documentation and record keeping as well. And I thank you for your attention this morning.

MR. REDDITT: Thank you very much, Elsa. At
this time we’re going to be discussing the DHR hiring agreement. And for that Mr. Adolphe Anjou is here from the Family Investment Administration, and he will discuss the DHR hiring agreement.

MR. ANJOU: Good morning. Thank you, James. Again, My name is AJ Anjou. Everybody should have a package. And that package is going to be gray or silver. If you open your package I will quickly go over that with you.

On the left-hand side are all the references as to what the hiring agreement came from. And then the second part of the actual contract, so you guys can actually review the contract, take a look at it, and get accustomed to what it entails. So pretty much a hiring agreement is an agreement entered into by the Department of Human Resources and the local Department of Social Services and a contractor doing business with the State under which the agencies agree to work
cooperatively in an effort to hire DHR or DSS’s customers. So the customers, such as the Family Investment Program recipients, the children, the children in foster care that age out of the foster care system, and individuals who are having to pay child support. So pretty much the role of the contractor is to notify DHR of all the job openings that exist as a result of this procurement contract, declare DHR the first source, give first preference to the candidates who refer to your agency. So that doesn’t necessarily mean that you have to hire everybody who is sent you. It simply means that, you know, you have to look at the qualified individuals and give them a chance. What they are trying to do is make sure that we work towards independency. So give -- allow the child-free working days to refer candidates for positions and pretty much give us the feedback on hiring decisions.
And on the left-hand side you will also receive instructions as to if you are the individual or the agency that obtained this contract, as to all the steps to follow regarding the hiring agreement. All right. Thank you.

MR. REDDITT: Thank you AJ. And for those of you that are joining us on the conference call, I will be sending you a copy of the package that we just discussed regarding the hiring agreement information.

At this time we’re going to move onto section two of the RFP which is the offeror minimum qualifications. Offerors responding to this RFP shall have three years of experience completing and submitting SSI applications and experience with the SSA working on the behalf of the State and local governments including experience with the SSA appeals process and representing clients at SSA appeals hearings.
As proof for meeting this requirement offerors shall provide with this proposal three references addressing the proposed services within this solicitation. And the references shall be submitted in the format as specified in section 4.4.2.9 of this RFP. At this time we’re going to move onto discussion of section three, which is the scope of work. Again, this section is divided into two functional areas, functional area one and functional area two. So I’m going to turn this portion of the contract over to the State project manager, Ms. Cynthia Crawley-Fox of the Family Investment Administration and Ms. Jill Taylor of the Social Services Administration within DHR.

MS. TAYLOR: I don’t think I need the mic. I talk pretty loud. I’m Jill Taylor with the Social Services Administration. And I’m going to be talking about the foster youth.
Currently Maryland has approximately 6,000 children in foster care statewide. The majority are in Baltimore City, Baltimore County, Prince George’s County, Montgomery and Anne Arundel Counties. The rest of them in the Eastern Shore or Western Maryland. And currently the maintenance costs or the living expenses for our foster youth are covered by federal and State dollars. And what we’re looking for is to get more dollars through the title two title 16 center that’s for our foster youth.

How are we going to do that? We’re going to send a list via email of all the potentially eligible children. So we’re going to be looking at the list and whoever we have determined as potentially disabled, have a deceased or disabled parent. So you’re going to get that list of children. Then weekly we’re going to be sending you a list of children that have exited care and newly entered
foster care and have had placement changes. And so while you have the first list, which is going to be a much larger list than the second list, you’re going to be looking at those lists and with your expertise you’re going to be deciding who is potentially eligible. You’re also going to be looking at changing the rep payee for those children so that the State can become the rep payee, and you’re going to be making applications.

So we’re looking for the contractor to do screenings, refer each child, file the SSA applications, and then once you get the second list you’re going to be doing that with those children also.

So what are you going to need to do? You’re going to need to collect, and copy and assemble documents required to complete the SSA applications for the foster youth. And in order to do that you’re
probably going to have to go to the local Department of Social Services offices, the individual offices, in order to get those documents and possibly meet with the case workers to talk about those children. You’re also going to file all the SAA forms to change the foster care, the child’s representative payee to the State. Number three. We’re amending where it says that you’re going to complete the SSA form D-24 to notify the child’s CINA attorney for the title two benefits. We also need you to do that now for title 16 benefits. And in your packet is a copy of that form. Currently our case workers are doing that, but we would be asking for you to be doing that. And then you would also be submitting a copy of that form to the local Department of Social Services assistant director.

I talked about that you’re going to file all necessary forms related to change in placements. So
you’re going to be notified when a foster child leaves a foster home and moves into a hospital or residential treatment center, and then when they move back to a foster home. Because it impacts the amount of money that you can draw down.

Number five, we no longer need you to prepare a dual process for IV-E and SSA. If the foster children needs to have a consult with another medical appointment, then you’re going to need to, through a report, notify the case worker. The case worker has five days to schedule that appointment with their doctor. And mind you, you have to remember that the appointment is not going to happen within those five days. It could be a week, it could be, you know, a couple of weeks or a month, or whatever. Once that appointment happens the worker has five business days to send the report back to you. Okay. And then you would submit all necessary forms.
If necessary you need to review and discuss applications SSA disability determination offices. You need to complete and submit all required continuing disability documentation to Social Services Administration to determine whether a youth needs the adult disability requirements.

Number 10, complete and submit disabled adult child benefit applications and supporting documentation to SSA in order to facilitate child to adult conversions. Review all denied cases and pursue all appropriate reconsiderations and appeals. And for youth that are exiting foster care, if you’ve started work on that and then in the midst of you get notified that the child is exiting care, then you’re supposed to submit all the documents to the Social Services or to Cynthia so that we can let the local department know where you are in that process, and so that we can follow up with that.
Any questions?

MR. REDDITT: If you have a question I ask that you would please identify your name and the name of your company and use the microphone.

MR. COAKLEY: Patrick Coakley, with Public Consulting Group. You had mentioned number five, that you did not need that service any longer?

MS. TAYLOR: No.

MR. COAKLEY: Why is that?

MS. TAYLOR: The State has been awarded the free waiver. And so we’ll be able to draw down.

MR. COAKLEY: You’ll be applying for all children and youth who would be eligible?

MS. TAYLOR: That’s correct.

MR. REDDITT: Any other questions regarding functional area one?

(No response.)

MS. FOX: Good morning. I just wanted to go
over functional area two. And as Vince mentioned, the State as far as Maryland adult recipients, we are looking at -- currently there are like 18,000 TDAP individuals who are receiving cash benefits, 4,000 TCA recipients, and 500 public assistance to adult recipients. And basically what we’re looking to do is to transition those individuals who are receiving medical coverage as well as substantially higher monthly grant amount and to allow these individuals to receive Social Security benefits if they are eligible to receive those benefits.

Basically what we will do is provide to the contractor a list of individuals who are potentially eligible for Social Security benefits. We would ask that the vendor provide (unintelligible) and try to obtain medical information for those recipients who are in care as well. No later than 15 calendar days after receipt of the request from the contractor the
State project manager will provide any additional medical information that the State may have for those individuals upon SSA’s request. Any additional medical information or evidence that is needed to help supplement the benefit application. Since our TDAP, TCA, and TAA recipients are income eligible for Medicaid, the vendor could utilize the customer’s Medicaid card to provide or request any additional medical reports or medical testing that’s needed. In the case where an individual does not have Medicaid, the vendor is to notify the State project manager and the State project manager at their discretion would be able to approve or deny the request for the additional medical testing.

Also, what we’re looking for is for the vendor to prepare any title two and title 16 benefit applications to SSA for any person who has been identified as potentially disabled. The vendor is
also supposed to review and -- review -- I apologize. Review the denied cases and pursue all appropriate reconsiderations and appeals, and that’s excluding any federal court appeals, including preparing and filing required information and presenting the information and all materials to the Social Security Administration.

Some of the general requirements that we’re looking for is that the contractor shall monitor and ensure complete, correct, and timely processing of all cases, to notify the State project manager on a weekly basis of individuals who are denied Social Security benefits, notify the State project manager on a weekly basis of any individual who is deemed to be noncooperative throughout the SSA disability process, to keep abreast of all Social Security guidelines, procedures, policy changes, and any changes that impact the eligibility process to notify the State
project manager. We expect that the contractor is available and available to -- and available throughout Monday through Friday, from eight to five o’clock p.m.

The contractor should secure all paper and electronic records of all referrals received from DHR. The contractor should also know that the information they obtain is also to remain at the sole discretion of the State of Maryland.

Reporting requirements. In the RFP we indicated there are several reports that we’re looking for the contractor to provide in both functional areas one and functional area two. I’m not going to go over every report, but they’re listed. And basically what it is, is to keep us abreast of what is going on as far as time restraints, how long it’s taking an application to get through the disability process, whether it was denied at initial application, the reconsideration level, the appeals level, to give
us an idea of what’s going on.

Performance measures. The contractor shall screen all referrals that are received within 45 calendar days of receipt of the referral. The contractor should complete and file the SSA benefit application no later than 90 days after receipt of the referral and to successfully obtain SSA approval on title two and title 16 benefits in 85 percent of the cases that are submitted. The contractor’s failure to meet any performance measures may result in a corrective action plan. If the contractor is asked to provide a corrective action plan, if the contractor fails to do that the State is allowed to withhold any portion of the contractor’s monthly payment amount.

I’ll move onto staffing requirements. The contractor should designate on individual to be the project manager for the contract. That person would be the central contact person for the contractor. That
person shall possess, at a minimum, a bachelor’s degree, five years experience in general program management, substantive and technical knowledge of the SSA benefits application process, and an understanding of the medical and vocational aspects of the disability, analysis, and sequential evaluation process. The contractor’s project manager’s duties shall include: Oversight of the project, maintaining quality assurance and providing input and recommendations regarding the title two and title 16 claims. Any questions?

MR. REDDITT: And please state your name and the name of your company before your question please.

MS. MADDEN: Edna Madden, Disability Applications and Appeals. My question is, if the client does not cooperate with you and this individual has serious mental impairments, what we still -- I’m trying to think of how I’m going to word this. Okay.
Some of the clients may have serious mental issues. So you may have quite a few that are noncompliant.

How are we supposed to -- or what assistance is the State going to provide us with in order to get those clients through the system.

MS. FOX: Basically what we’re looking for is that you would provide us with feedback. And that’s something probably that we would have to work with on an individual basis, but at least that you’re allowing us the information, providing us with the information that that customer is noncooperative or you haven’t been able to reach them to give us that feedback. And I’m sure that’s something we’ve heard, you know, more than --

MR. NORBECK: Just a quick follow up on that. William Norbeck. In regards to the 85 percent favorable decision, would those noncompliant or unable to locates be extricated from that analysis?
MS. FOX: That’s a question we’ll have to get back to you on.

MR. REDDITT: We’ll have to get back to you with the response to that. Any other questions regarding functional area two?

(No response.)

MS. FOX: Thank you.

MR. REDDITT: Thank you, Cynthia. At this time we’re going to move to the discussion of section four, which is the proposal format.

First of all, we’re going to look at section 4.1, which is the two-part submission. Offeror shall simultaneously submit proposals in two separate volumes, volume one is your technical proposal and volume two is your financial proposal.

In section 4.2, the proposals, volume one, technical proposal and volume two, the financial proposal, shall be sealed separately from one another.
It is preferred but not required that the main email address and telephone number of the offeror be included on the outside of the packaging for each volume. Each volume shall contain an unbound original, to be so identified, and five copies. Unless the resulting package may be too unwieldy, the State’s preference is for the two packages, the two sealed volumes to be submitted together in a single package including a label bearing the RFP title and agency control number, the name and address of the offeror, and the closing date and time for receipt of proposals. An electronic version, either on CD or DVD form of the technical proposal, in Microsoft Word format, must be included with the original technical proposal. An electronic version in CD or DVD format of the financial proposal in Microsoft Excel format must be enclosed with the original financial proposal. CDs or DVDs must be labeled on the outside with the
RFP title and agency control number, name of the offeror, and volume number. CDs or DVDs must be packaged with the original copy of the appropriate proposal either technical or financial. A second electronic version of both the financial and the financial proposal in searchable Adobe PDF format shall be submitted on CD or DVD for Public Information Act request. This copy shall be redacted so that confidential and/or proprietary information has been removed. All pages of both proposal volumes shall be consecutively numbered from beginning page one, to end, which is whatever the last page number is.

Section 4.4, your technical proposal. Please note that no pricing information is to be included in the technical proposal. Pricing information is only be included in your financial proposal. The technical proposal shall include the documents and information in the order that will be specified in just a second.
Each section of the technical proposal shall be separated by a tab and be labeled as the following:

Tab “A” will be the title page and table of contents,

Tab “B” will be your claim of confidentiality information, Tab “B” will -- I mean, Tab A-1, I’m sorry, is your claim of confidentiality. Tab “B” will be your transmittal letter, and the letter shall include the following information: the name and address of the offeror, name, title, email address and telephone number of the primary contact for the offeror, the solicitation title and agency control number, the signature, typed name, and title of an individual authorized to commit the offeror to the proposal, the federal employee identification number of the offeror, the offeror’s eMaryland Marketplace registration number, the offeror’s MBE certification number, the offeror’s SBR certification number if you have one, the offer VSBE registration or certification
number, and it should note acceptance of all amendments to the RFP, acceptance of all State terms and conditions. If there are any exceptions are taken, they must be noted in the executive summary which will be under a separate tab, and also it should also include, as I mentioned, acknowledgment of all amendments that were issued to the RFP.

Under Tab C, that is your executive summary. And that is also the section where any issue with or exceptions with the terms and conditions of the contract should be noted.

Under tab “D,” that is your minimum qualifications documentation. Tab “E” is your offeror’s technical proposal, response to the RFP requirement, and proposed work plan. Tab “F” is the offeror qualifications and capabilities. Tab G is the experience and qualifications of proposed, including proposed subcontractors. Tab “H” is your references.
Tab “I” is your list of current and/or prior State of Maryland contracts. Tab “J” is your financial capability information. Tab “K” is your certification of insurance information. Tab “L” will be the listing of all your subcontractors that will be providing services under this RFP. Tab “M” is your legal actions summary. And again, all of these sections are covered in more detail in the RFP itself. Tab “N” is your information regarding the economic benefits factor. And Tab “O” can be any other required or additional information. This is the section where also all of the required forms that we discussed earlier are to be submitted under tab “O.”

Section 45. Is your financial proposal, which is also volume two of the proposal. Under separate sealed cover from the technical proposal, and clearly identified in the format identified under section 4.2, offeror shall submit an original unbound
and five copies, and the electronic version in Microsoft Excel format of the financial proposal. The financial proposal shall contain all price information in the format as specified in attachment “F.” The offeror shall complete the financial proposal form only as provided in the financial proposal instructions and the financial proposal form itself.

Let’s move to section five now, which is the Evaluation Committee, evaluation criteria and selection procedure.

Section 5.1, the Evaluation Committee. Evaluation of all proposals will be performed in accordance with code of Maryland regulations 21.05.03 by a committee established for that purpose and based on the evaluation criteria set forth in the RFP. The Evaluation Committee will review all proposals, may participate in offeror presentations and discussions, and will provide input to the procurement officer.
The Department reserves the right to utilize the services of an individual or individuals outside of the established Evaluation Committee for advice and assistance as it may be deemed appropriate.

Section 5.2 is the technical proposal evaluation criteria. The criteria to be used to evaluate each technical proposal are listed as follows in descending order of importance. Offeror’s technical response to RFP requirements and work plan. Offeror’s qualifications and capabilities. Experience and qualifications of proposed staff, including proposed subcontractors and economic benefits to the State of Maryland.

Section 5.3, financial proposal evaluation criteria. All qualified offerors which is defined as a responsible offeror determined to have submitted an acceptable technical proposal will be ranked from the lowest to the highest price based upon the offeror’s
total five-year price, which includes the three-year base period as well as the two-year option period within the stated guidelines as set forth in the RFP, and as submitted on attachment “F,” which is the financial proposal form.

Section 5.5, the selection procedure. A determination is made, first, that the MDOT certified MBE utilization and fair solicitation affidavit is included and will be completed if there is an MBE goal. In addition, a determination is made that the veteran owned small business enterprise utilization affidavit and subcontractor participation schedule, which is attachment –1, is included and properly completed if there is a VSBE goal. The next step in the selection procedure is that technical proposals are evaluated for technical merit and rank. During this review oral presentations and discussions may be held. The purpose of such discussions will be to
assure a full understanding of the State’s requirements and the offeror’s ability to perform the services as well as to facilitate arrival at a contract that is most advantageous to the State. Offerors will be contacted by the State as soon as any discussions are scheduled. Offerors must confirm in writing any substantive oral clarification of, or changes in the technical proposals made in the course of discussions. Any such written clarification or changes then become part of the offeror’s technical proposal. Technical proposals are then given a final review and they are ranked based upon the evaluation criteria that was discussed previously.

The next step the selection procedures, the financial proposals of each qualified offeror will be evaluated and ranked separately from the technical proposals. When in the best interest of the State the procurement officer may permit qualified offerors to
revise their initial proposals and submit in writing best and final offers or BAFOs. The State may make an award without issuing a request for a BAFO.

Upon completion of the technical and financial proposal evaluation and rankings each offeror will receive an overall ranking. The procurement officer will recommend award of the contract to the responsible offeror or offerors that submitted the proposal deemed or determined to be the most advantageous to the State considering price and technical factors. In making this most advantageous proposal determination, technical factors and financial factors will carry equal weight.

At this time I open the floor to any and all questions regarding any of the information that has been discussed. And again, if you have a question please identify your name and the name of your company.

MR. ELVIN: Mark Elvin with
Maximus. It’s my understanding that the, this whole process will begin by the selected vendor receiving the lists. Will there be some pre-screening of those lists or will they be all inclusive of all the clients potentially, or will the State be making some kind of pre-decision as to which clients are most likely eligible and being passed to the vendors?

MS. TAYLOR: For the foster youth we’re going to be using our system that I had identified potential disabilities or deceased parents. So that’s pre-screening for us.

MR. ELVIN: Okay. Do you have a certain -- do you have out of that 6,000 population do know currently, how many children are currently receiving that and how many do you have that are potential clients; do you have a system that generate that? Do you know a certain number of referrals that you’ll be sending to the vendors?
MS. TAYLOR: I don’t at this time, but certainly could get that.

MR. ELVIN: And for the adults, second question, are there guidelines set up by the State to determine at what time you disengage certain clients or is the vendor to continue working with the client for an endless period of time? Or are there certain milestones that the vendor has to for contact with no response and then he can stop working with a client and move on?

MS. FOX: Right. Basically with you giving us feedback on where the clients are in the disability process would help us to make that determination whether or not you want to continue working with an individual or not.

MR. ELVIN: Okay. And finally, for these children who exit foster care while you’re in the process of doing an application, what’s the
compensation for all the work that we’ve done for that application before the child discharges and returns home in the event that that application is later determined approved?

MS. TAYLOR: My understanding is that it’s not one of the payout points.

MR. ELVIN: So you could do a lot of work up front and the child --

MR. REDDITT: We will provide a response to you.

MR. ELVIN: Okay.

MR. COAKLEY: Pat Coakley with Public Consulting Group. Of the 18,000 TDAT members do you know the breakout between how many are disabled with long-term disability verses medically impaired with short-term disability?

MS. FOX: I don’t know the break out, but basically the customers that we would refer to you
would be customers who have been considered long-term disabled individuals.

MR. COAKLEY: Would we be able to get that number at a later date, just of that 18,000 what population would fall into the long-term?

MS. FOX: We’d have to get back to you with an answer for that question.

MR. COAKLEY: And just a second question. In the RFP it mentions that if a foster care population a contractor performed an assessment to provide some recommendations. Would we be able to get a copy of that report?

MS. TAYLOR: Ask that question again.

MR. COAKLEY: Sure. It’s mentioned in the RFP that a contractor performed an assessment of foster care population and the opportunity around the Social Security benefits.

MS. TAYLOR: To determine if they’re
MR. COAKLEY: To determine if the process -- it sounds like it was an assessment of sorts, and what was the process, and could there be improvements made, which I think led to the RFP is what it says, part of the background.

MS. FOX: That’s a Scott question I think.

MR. MOORE: Scott Moore with the Attorney General’s Office. That’s another question we’ll have to review and provide a response for. I’m not sure at this point we disclose that study or not.

MR. COAKLEY: Thanks.

MR. REDDITT: Any other questions regarding any of the information in the RFP?

MS. MADDIE: The cases that may go back to DHR, do you have people in place that have the qualifications to do that SSA applications appeals and hearings?
MS. FOX: If I’m understanding you correctly, that’s what the vendor would do.

MS. MADDIE: I understand. But I’m talking about the cases that go back to where the child may have aged out of the system. And I thought I heard that the application or some part of the Social Security --

MS. TAYLOR: No. We would ask the contractor to make sure that the youth is eligible for the adult benefit.

MR. REDDITT: And again, keep in mind that we are awarding up to two contracts, one for the children’s side and one for the adult side. So if there was a child that would have been eligible but they aged out of the system, they would move over to the adult contractor if they’re still eligible for those benefits. Maybe that might answer your question a little better.

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MR. MADDIE: I wouldn’t be eligible if I only had the children contract?

MR. REDDITT: Correct.

MR. CONLEY: Joseph Conley, SQN Systems. If I could ask a question about the goals.

MR. REDDITT: Yes.

MR. CONLEY: Can a veteran company also be, fulfill an MBE goal, one of the MBE goals?

MR. REDDITT: The company would have to be registered as a minority business enterprise in order to meet the MBE goal.

MR. CONLEY: Okay.

MR. REDDITT: Okay. So if you’re a veteran company but you’re not registered as an MBE, we cannot use your work to satisfy the MBE goal.

MR. CONLEY: If you are both?

MR. REDDITT: Right. And again, just to clarify that. The vendor must be certified at the
time of proposal submission in order to be considered. A vendor can’t be pending and you put them on your affidavit. We cannot accept that. The vendor has to be certified at the time of proposal submission in order to be considered for meeting the MBE subcontracting goal.

MR. ELVIN: Mark Elvin with Maximus again. With regard to the proposal itself, you said to submit two separate proposals?

MR. REDDITT: Yes, sir.

MR. ELVIN: For each area?

MR. REDDITT: Correct.

MR. ELVIN: Does that mean that you want two transmittal letters?

MR. REDDITT: Yes, sir.

MR. ELVIN: So completely two separate?

MR. REDDITT: Completely two separate. Yes, sir.
MR. REDDITT: Any other questions

(No response.)

MR. REDDITT: Well, let me remind everyone that the closing date and time is Monday, December 1, 3:00 p.m. Make sure all proposals are submitted to me by that time. And on behalf of the Department I would like to thank you for attending. And this concludes this pre-proposal conference. Thank you all very much.

(Whereupon, at 10:41 a.m., the meeting was adjourned.)
CERTIFICATE OF NOTARY

I, KATHLEEN A. COYLE, the officer before whom the foregoing testimony was taken, do hereby certify that the witness whose testimony appears in the foregoing transcript was duly sworn by me; that the testimony of said witness was taken by me by stenomask means and thereafter reduced to typewriting by me or under my direction; that said testimony is a true record of the testimony given by said witness; that I am neither counsel for, related to, nor employed by any of the parties to the action in which this testimony is taken; and, further, that I am not a relative or employee of any attorney or counsel employed by the parties hereto, nor financially or otherwise interested in the outcome of the action.

This certification is expressly withdrawn and denied upon the disassembly or photocopying of the foregoing transcript of the proceedings or any part thereof, including exhibits, unless said disassembly or photocopying is done by the undersigned court reporter and/or under the auspices of Hunt Reporting Company, and the signature and original seal is attached thereto.

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KATHLEEN A. COYLE
Notary Public in and for 
the State of Maryland

My Commission Expires:

April 30, 2018