

MARYLAND DEPARTMENT OF HUMAN RESOURCES

PRE-PROPOSAL CONFERENCE

FIA/OHEP 14--003--S

ADMINISTRATION OF THE MARYLAND ENERGY ASSISTANCE (MEAP)
AND ELECTRIC UNIVERSAL SERVICE PROGRAMS (EUSP)

311 W. Saratoga Street
First Floor Conference Room
Baltimore, Maryland 21201

Tuesday, October 7, 2014

ATTENDANCE:

AGENCY:

Nneka Willis--Gray, Procurement Officer

Lindsay Robbins, Director, Home Energy Programs

Kenneth Jessup, Bureau of Work Force Development

Wayne Dixon, Procurement Division

Danika Montague, Procurement Division

Hemant Patel, Operation Manager, OHEP

Stacey Pollitt, Procurement Specialist, OHEP

ATTENDEES:

Kim Neely, Harford Community Action Agency, Inc.
Lisa Zimmerman, Harford Community Action Agency, Inc.
Judith R. Mason, Harford Community Action Agency, Inc.
Paula C. Savini, Catholic Charities
Evelyn Blackman, Catholic Charities
Linda Green, Garrett County Community Action Committee
Carl E. Burke, Community Action Council
Tina M. Barse, Community Action Council
Beverly Davis, Human Services Programs
Paula Reynolds, Human Services Programs
Anne Brinker, Community Action Council of Howard County
Edie Manney, Community Action Council of Howard County
Deborah P. Austin, Department of Human Resources
Gretchen Clausell--Huntley, Community Action Partnership
Ann Benham, Allegany County Human Resources Development
Commission
Delilah Balz, Southern Maryland Tri-County Community
Action Committee
Marilyn M. Neal
Candeaner Robinson
Janet Cuffee
Janetta Hampton
Erica Matthews
Virginia Pilkerton
James Harding
Jean Herringer

Reported by: Carol O'Brocki, Notary Public
Hunt Reporting Company, Glen Burnie, Maryland

1 P R O C E E D I N G S

2 (10:05 a.m.)

3 MS. WILLIS-GRAY: Hello and good morning,
4 everyone. It's my pleasure to welcome you to the
5 Department of Human Resources. We're here to go over
6 the request for proposals for the Maryland Energy
7 Assistance Program and Electric Universal Service
8 Program. My name is Nneka Willis--Gray and I am the
9 Procurement Officer for this solicitation.

10 Hunt Reporting is recording this conference
11 and a transcript will be made available on Department of
12 Human Resources website and eMaryland Marketplace.

13 There will be questions and responses section
14 at the end of the presentation, so please hold all of
15 your questions until that time.

16 And now we will go through introductions.
17 I'll start with myself and we will move to the right.
18 My name is Nneka Willis--Gray, Procurement Officer for
19 the Department of Human Resources.

20 MS. ROBBINS: I'm Lindsay Robbins. I'm the
21 Director of the Office of Home Energy Programs.

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1 MR. PATEL: I'm Hemant Patel. I'm the
2 Operation Manager for the OHEP.

3 MS. POLLITT: Good morning. Stacey Pollitt,
4 Procurement Specialist for OHEP.

5 MS. SINGLETON: Good morning. Elsa Singleton.
6 I'm with the Procurement Division.

7 MR. CHANG: Hubert Chang. I'm an Assistant
8 Attorney General.

9 MS. MONTAGUE: Danika Montague. I'm with the
10 Procurement Department.

11 MS. AUSTIN: Good morning. Deborah Austin.
12 I'm with the Procurement Division.

13 MR. DIXON: Wayne Dixon, Procurement Division.

14 MR. JESSUP: Good morning. My name is Kenneth
15 Jessup with the Bureau of Work Force Development. I'm
16 actually here today representing the Hiring Agreements
17 Unit.

18 MS. WILLIS-GRAY: And introductions from the
19 front row, please? Starting at the front row.

20 MS. MANNEY: Hi. My name is Edie Manney. I'm
21 with the Community Action Council of Howard County.

1 MS. BRINKER: Anne Brinker, Community Action
2 Counsel of Howard County.

3 MS. SAVINI: Paula Savini with Catholic
4 Charities Diocese of Wilmington.

5 MS. BLACKMAN: Evelyn Blackman, Catholic
6 Charities Diocese of Wilmington.

7 MS. NEAL: Marilyn Neal, Executive Director of
8 Talbot County, Maryland.

9 MS. ROBINSON: Cardeaner Robinson,
10 Neighborhood Service Center, Talbot County.

11 MS. CUFFEE: Tanet Cuffee, Neighborhood
12 Service Center, also Talbot County.

13 MS. GREEN: Linda Green, Garrett County.

14 MS. HAMPTON: Janetta Hampton, Allegany
15 County, Outreaching Assistance.

16 MS. MASON: I'm Judy Mason, Executive
17 Director, Harford Community Action Agency.

18 MS. ZIMMERMAN: Lisa Zimmerman, Energy
19 Programs, Harford Community Action Agency.

20 MS. NEELY: Kim Neely, Harford Community
21 Action Agency, Assistant Director.

1 MS. MATTHEWS: Good morning. Erica Matthews,
2 Anne Arundel County Community Action Agency.

3 MS. HUNTLEY: Gretchen Huntley, CEO with Anne
4 Arundel County Community Action Agency.

5 MR. BURKE: Good morning. I'm Carl Burke with
6 Washington County Community Action Council.

7 MS. BARSE: Tina Barse, Washington County
8 Community Action Council.

9 MS. DAVIS: Beverly Davis, Human Services
10 Programs, Carroll County.

11 MS. REYNOLDS: Paula Reynolds, Human Services
12 Programs, Carroll County.

13 MS. PILKERTON: Virginia Pilkerton, Southern
14 Maryland Tri-County Community Action.

15 MR. HARDING: Greg Harding, Southern Maryland
16 Tri-County.

17 MS. BALZ: Delilah Balz, Southern Maryland
18 Tri-County Community Action Committee.

19 MR. HOWARD: Good morning. Gregg Howard,
20 Director of Procurement and Compliance for the
21 Department of Human Resources.

1 MS. JORDAN: Jackie Jordan, DHR, Procurement
2 Division.

3 MS. HENNINGSER: Jean Henningser, Seedco.

4 MS. WILLIS-GRAY: Thank you all. Very nice to
5 meet you. Right now we'll have opening remarks by Ms.
6 Lindsay Robbins, Program Director for Office of Home
7 Energy Programs.

8 MS. ROBBINS: Thank you, Nneka. So, good
9 morning, everyone. I don't have much to add to what
10 Nneka said. She covered a little bit of what I was
11 going to talk about, but I just wanted to say good
12 morning. That it's really glad to see such a great
13 turnout here.

14 We're very excited to have the opportunity to
15 open up the chance to administer these programs across
16 the State, and our goal here today is really just to
17 give you a brief overview of the RFP. We have kind of
18 experts on each of the different sections who are going
19 to give an overview of the Request for Proposal.

20 But really what we're here today is to answer
21 all of your questions and clarify anything that you want

1 to know about the program itself or the process for
2 applying.

3 So, with that, I will turn it back over to
4 Nneka to get started with the overview of the RFP.

5 MS. WILLIS-GRAY: Thank you, Ms. Robbins. Now
6 we're going to go over the highlights of the RFP.

7 General information regarding the request for
8 proposals begins on page 7 of the RFP if you're
9 following along. The objective of this RFP is to
10 provide outreach activities, application intake,
11 certification of benefits, payment processing,
12 notification of eligibility determinations, and appeals
13 for benefits, amounts, or denial.

14 The Department of Human Resources, Family
15 Investment Administration and Office of Home Energies
16 Programs intends to acquire contractual services for the
17 administration of the Maryland Energy Assistance
18 Program, the Electrical Universal Service Program, and
19 the recording of applications for the Utility Service
20 Protection Plan.

21 Proposals are being requested for 14 of

1 Maryland's 24 jurisdictions: Allegany, Anne Arundel,
2 Calvert, Carroll, Charles, Garrett, Harford, Howard, St.
3 Mary's, Somerset, Talbot, Washington, Wicomico, and
4 Worcester counties. The remaining ten jurisdictions not
5 covered in this RFP are served by the Maryland
6 Department of Human Resources, local Department of
7 Social Services, and Baltimore City government.

8 The anticipated duration of this contract is
9 for a three-year period, beginning April 1, 2015 and
10 ending on or about March 31, 2018. There is one two-
11 year option period to be exercised at the sole
12 discretion of the State.

13 The Department intends to make a single award
14 for each of the 14 jurisdictions for which proposals are
15 requested through this RFP. Offerors may submit
16 proposals for one jurisdiction, more than one
17 jurisdiction by submitting one proposal and identifying
18 the jurisdictions the offeror desires to serve as
19 required in Section 4.2.2 of the RFP. A separate
20 financial proposal must be submitted for each
21 jurisdiction as required in Section 4.2.2.

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1 Offerors either directly or through their
2 subcontractors must be able to provide all services and
3 meet all the requirements requested in this
4 solicitation. The successful offeror shall remain
5 responsible for contract performance, regardless of
6 subcontractor participation in the work.

7 Now we're going to go to the hiring agreement,
8 which will be provided to us by Mr. Kenneth Jessup.

9 MR. JESSUP: Good morning, all. Hopefully you
10 all received the packet when you came in this morning.
11 It should say Informational Process of Hiring
12 Agreements. And as you open your packet, on the left-
13 hand side of your packet, is all statutory references
14 regarding the hiring agreements. You can review that at
15 your leisure.

16 On the right side -- I'm just going to give
17 you a brief overview of what hiring agreements are. The
18 hiring agreement is an agreement intimate to the
19 Department of Human Resources or local Department of
20 Social Services, and a contractor doing business with
21 the State under which DHR under which local -- or the

1 local and the contractor agree to work cooperatively in
2 an effort to identify and hire current and former family
3 investment program recipients, their children, foster
4 youth, or and obligators to fill job openings of the
5 contractor as a result of the procurement contract.

6 Hiring agreements will remain in effect during
7 the duration of the contract. Right behind that it
8 gives a brief overview of the contractor's role and the
9 process. Notifying DHR of all openings and existence as
10 a result of procurement contract, declare DHR the first
11 source for job openings, and give first preference to
12 DHR and local DSS candidates, allow DHR three working
13 days to refer candidates for the position, and provide
14 DHR and local DSS with feedback on hiring decisions of
15 candidates, and comply with the hiring agreements
16 throughout the life of the contract.

17 Lastly, there is a page that gives you
18 information about the hiring agreement and who you
19 should contact, with their email addresses. The Hiring
20 Manager, Mr. A.J. Andu (phonetic) was here today. He
21 wasn't able to be here originally and I'm just stepping

1 in for him at this point. As you go further through the
2 packet, you'll see additional information. If you have
3 any further questions, please email Mr. Andu and he'll
4 get back to you as quickly as possible. Thank you.

5 MS. WILLIS-GRAY: Thank you, Mr. Jessup. Mr.
6 Wayne Dixon will review the Living Wage requirements.

7 MR. DIXON: Good morning. Maryland law
8 requires a contractor as meeting certain conditions, pay
9 a living wage to covered employees on State service
10 contracts over \$100,000.

11 The Commissioner of Labor and Industry at the
12 Department of Labor, Licensing, and Regulation requires
13 that a contractor subject to the Living Wage law submit
14 payroll records for covered employees and a signed
15 statement indicating that they pay the living wage to
16 covered employees, or receive a waiver from living wage
17 reporting requirements.

18 If subject to the Living Wage law, the
19 contractor agrees that it will abide by all Living Wage
20 law requirements, including but not limited to reporting
21 requirements in COMAR 21. The contractor understands

1 that failure of the contractor to provide such documents
2 is a material breach of the terms and conditions and may
3 result in contract termination, disqualification by the
4 State from participating in State contracts, and other
5 sanctions.

6 Additional information regarding the State's
7 Living Wage requirement is contained in Attachment G.
8 Offerors must complete and submit the Maryland Living
9 Wage Requirements Affidavit of Agreement -- that's
10 Attachment G1, with their proposal. If an offeror fails
11 to complete and submit the required documentation, the
12 State may require -- may determine an offeror to be not
13 responsible under State law.

14 Contractors and subcontractors subject to the
15 Living Wage law shall pay each covered employee at least
16 the minimum amount set by law for the applicable tier
17 area. The specific living wage rate is determined by
18 whether a majority of the services take place in a Tier
19 1 area -- that's 1339, or Tier 2 area, 1006 of the
20 State.

21 The Tier 1 area includes Montgomery, Prince

1 George's, Howard, Anne Arundel, and Baltimore counties,
2 and Baltimore City. The Tier 2 area includes any county
3 in the State not included in the Tier 1 area. In the
4 event that the employees who perform the services are
5 not located in the State, the head of the unit
6 responsible for the State contract shall assign the Tier
7 based upon where the recipients of the services are
8 located.

9 The contract resulting from this solicitation
10 will be determined to be a Tier 1 contract or a Tier 2
11 contract depending on the locations from which the
12 contractor provided 50 percent or more of the services.
13 The offeror must identify in its proposal the location
14 or locations from which services will provided,
15 including the location or locations from which 50
16 percent or more of the contract services will be
17 provided.

18 If the contractor provides 50 percent or more
19 of the services from a location or locations in Tier 1
20 jurisdictions, the contract will be a Tier 1 contract.
21 If the contractor provides 50 percent or more of the

1 services from a location in a Tier 2 jurisdiction, the
2 contract will be a Tier 2 contract. If the contractor
3 provides more than 50 percent of the services from an
4 out-of-State location, the State or agency determines
5 the wage tier based on where the majority of the service
6 recipients are located.

7 Information pertaining to reporting
8 obligations may be found by going to the Maryland
9 Department of Labor, Licensing, and Regulation website.
10 Please note, the living wage may change annually,
11 however. The contract price may not be changed because
12 of a living wage change. Thank you.

13 MS. WILLIS-GRAY: Thank you, Mr. Dixon. And
14 Ms. Danika Montague will now go over the minimum
15 qualifications.

16 MS. MONTAGUE: Good morning. My name is
17 Danika Montague and I'll be reading Section 2, Minimum
18 Qualifications.

19 The offeror must provide with its proposal the
20 following minimum qualifications: the offeror shall
21 possess a minimum of three years prior experience in

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1 delivering Human Service programs to low income
2 households. As proof of meeting this requirement, the
3 offeror shall provide with the proposal three business
4 references from the past five years able to attest to
5 the offeror's experience in providing human service
6 programs to low income households.

7 MS. WILLIS-GRAY: Thank you, Ms. Montague.
8 And Section 3, the Scope of Work, will be presented by
9 the Office of Home Energy. The Section will begin on
10 page 28. Ms. Robbins will go over the Scope of Work.
11 Mr. Hemant Patel will go over the invoicing, and Ms.
12 Stacy Pollitt will go through the deliverables.

13 MS. ROBBINS: Thank you. So hello again,
14 everyone. I am assuming that everyone has read through
15 this section of the RFP, so I'm going to try and just
16 provide a relatively brief overview.

17 The first paragraph of the Statement of Work
18 Requirements refers to the COMAR regulations that any
19 potential contractor is going to have to comply with.
20 We strongly encourage you to carefully review those
21 COMAR requirements, which I believe are Attachment S,

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1 and to ensure that your proposal showcases your ability
2 to comply with all of the procedures that are described
3 in COMAR.

4 After COMAR compliance, the first requirement
5 listed in the Statement of Work is that the contractor
6 maintain a facility within the jurisdiction that they're
7 serving that will be open to the public and comply with
8 all of the requirements that are listed in the Statement
9 of Work, which include providing all of the necessary IT
10 equipment and software that the staff serving the
11 program are going to use to do their jobs, and making
12 sure that that equipment and software complies with all
13 of Maryland's requirements.

14 Contractors are also required to provide
15 outreach for the program, and ensure that all of the
16 eligible program participants that are in the
17 jurisdiction that they're serving are aware of and have
18 access to apply to the program. The contractor will
19 need to develop an outreach plan on an annual basis to
20 show how they will provide outreach to the eligible
21 population in their jurisdiction, including how they're

1 going to develop successful partnerships with other
2 groups within the community in order to conduct that
3 type of outreach.

4 On to Application Intake. Contractors are
5 required to accept applications throughout the program
6 year and to meet the requirements stated in COMAR for
7 accepting and processing applications. Some of the key
8 deadlines to keep in mind are the seven-day deadline to
9 determine whether or not an application is complete, and
10 to send a request for additional information notice if
11 that application is not complete; ensuring that the
12 information required for the application is entered into
13 the OHEP data manage system within 30 days of the
14 receipt of the application; making an eligibility
15 determination no later than 45 days after the receipt of
16 the application; and generating eligibility notices
17 within seven days after a determination is made for
18 denials, and within ten days if a benefit is being
19 provided.

20 Those are very important deadlines that we
21 have to stick to and we want to make sure that any

1 contractor that takes on this contract has the
2 capability of meeting those deadlines.

3 The next section in the requirements is
4 payment processing, which will be covered by Hemant
5 Patel in a moment. He's going to be going over both of
6 the fiscal sections including payment processing and
7 fiscal reporting.

8 So on to requirements for handling the MEAP
9 energy crisis situations. The MEAP energy crisis season
10 runs from November 1 through March 31, and during that
11 time contractors are required to required expedited
12 services to customers that are facing a crisis
13 situation. We define "crisis" as when a household has
14 less than four days of heating fuel left; when a
15 household has had their primary heat utility
16 disconnected; or they have a disconnection notice that
17 says it's going to be shut off within four days; or when
18 a household does not have an operational furnace.

19 Crisis applications must be reviewed and
20 eligibility determinations must be made within 48 hours
21 of receipt of an application, and that actually -- that

1 deadline increases to within 18 hours if it is for a
2 vulnerable household. We define "vulnerable households"
3 as households with a child under the age of two; a
4 person over the age of 65; or someone who has a medical
5 condition that will be affected by losing heat in the
6 home. So contractors must submit an annual plan that
7 showcases how they plan to deal in an expedited way with
8 a crisis situation.

9 On to fraud. Fraud is a definitely an
10 important and difficult issue in the OHEP programs and
11 it's the contractor's responsibility to identify
12 potential fraud and misrepresentation. It could be
13 committed by applicants, energy suppliers, or staff in
14 your own offices. Every contractor must put procedures
15 in place to identify potential issues and to obtain
16 verification of suspected fraud through additional
17 documentation or when appropriate through contacting
18 relevant sources that may have informed you the fraud
19 was taking place. And the contractor must contact OHEP
20 if you obtain evidence that supports suspected
21 fraudulent activities so the State can take the

1 appropriate steps to resolve it.

2 On to monitoring and performance assessments.

3 All contractors are required to cooperate with all OHEP

4 monitoring and/or audits, and any audits that may be

5 conducted by other Federal or State agencies. Notice

6 will always be provided within at least one business day

7 of an on-site visit. Contractors must make any program

8 or fiscal documents required available to the personnel

9 that are conducting the site visit.

10 OHEP conducts its own monitoring of all of the

11 local agencies on an annual basis, and the contractor

12 should be prepared to receive at least one on-site visit

13 from OHEP monitoring staff each year, and based on that

14 visit and documentation review, OHEP will prepare a

15 monitoring report that's given back to each of the local

16 agencies.

17 One of the new things that some of you who

18 have been in the program before may have noted in this

19 RFP, beginning in Fiscal Yea 2016, all contractors are

20 going to be evaluated based on a set of performance

21 measures which are outlined in detail in the RFP.

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1 That's going to happen on an annual basis and
2 contractors will receive an annual score that marks
3 their performance on a scale of 0 to 100. Contractors
4 that score less than an 85 are going to be required to
5 develop and implement a corrective action plan, and
6 those scores are something that we are going to taken
7 into consideration when we decide whether or not to
8 exercise the optional renewal for the last two years of
9 the contract. So that's definitely something important
10 to keep in mind.

11 And finally, the contractor is required to
12 designate a project manager that will make themselves
13 available to our office to discuss and report on day-to-
14 day operations, and attend any other meetings as needed.
15 And if selected, the contractor should be prepared to
16 attend a post-award orientation conference which will
17 take place no later than two weeks after the contracts
18 are approved, and will cover service delivery, invoice
19 processing, monitoring, and other contract terms and
20 conditions.

21 And with that, I will turn over the podium to

1 Hemant Patel to go over payment processing and fiscal
2 reporting.

3 MR. PATEL: All right. My name is Hemant
4 Patel. I'm the Fiscal Operational Manager here. Under
5 the RFP on page 32, you have a payment processing
6 Section 3.3.5, and it tells you to -- the COMAR 7,
7 Subtitle 3, Chapter 21 and 22.

8 On the fiscal accounting record must be under
9 OHEP accounting practice and has to be maintained
10 according to the Federal and the State's standards. And
11 monthly reports should be dated and signed for the
12 monthly financial report, and benefit funds. The
13 benefit funds are 100 percent now Federal live funds, so
14 the OMB 133 applies for that. So on the record must be
15 submitted every month to Stacey Pollitt or her current
16 compliance officer, and must be on the record on the
17 file.

18 And you make sure that under OHEP management
19 system that all the EDS has to be in the same status,
20 and any later than 55 days after the date of the initial
21 application was received. In the OHEP benefits system,

1 the EDS must be certified and EDS status on a weekly
2 basis, and specified by the Section 3.3.5.

3 The MEAP benefit who I'll say is for the
4 payment for the (indiscernible) fuel supplier, the
5 payments are issued by the landlord and application is
6 done every year, submitted by the contract's own fiscal
7 system. On the part where the State project manager or
8 he has exhausted either funds or for (indiscernible) or
9 ESP, the contractor must suspend or cancel all payments
10 as directed by the State Project Manager. The
11 contractor selects only household benefit bodies meeting
12 OHEP management system no later ten days after the
13 payment is made for the energy supplier.

14 And Section 3.3.5, which is the most important
15 for the application report through the OHEP management
16 system for the first business day of each week. And any
17 other identified under OHEP completed application report
18 must be dissolved no more than seven days.

19 Invoice processing -- hold on for a second.
20 Invoicing -- that's on page 43, and that's Section 3.7,
21 that all invoices originally set by the contractor and

1 submitted to the State Project Manager, and all invoices
2 should include the following information -- contractor
3 name, address, Federal ID number, invoice period, and
4 before that, page 177, you have an invoice form there.
5 It should be submitted every quarterly for the payment
6 processing, or the invoicing for refund.

7 And the payment bidding in terms is on page
8 44, and it should be submitted to Stacey Pollitt our
9 Procurement Specialist and it's an OHEP quarterly
10 invoice and it's Attachment 8A. And it should be
11 submitted by the 15th day of the first month of the
12 quarter. An invoice should be one-fourth of each annual
13 contract amount, using the OHEP quarterly invoice.

14 Are there any questions for the payments
15 processing?

16 MS. WILLIS-GRAY: I think we're going to hold
17 questions until the end.

18 MR. PATEL: Okay. Thanks.

19 MS. POLLITT: Good morning. Okay. So I'm
20 going to speak on the deliverables, which of course,
21 Hemant has already hit some of it with the

1 administrative report and the benefit funds report.

2 On page 44 of the RFP it pretty much is self-
3 explanatory as what is required from the contractors to
4 meet each deadline of each report each month. One of
5 the first reports again is the Administrative and the
6 Benefit Fund report, which is due the 15th of each
7 month. The annual Outreach Plan, which is due August
8 the 15th of each year. The annual Energy Crisis Plan,
9 which is due September the 30th of each year. The
10 Close-Out Report or the Close-Out Record, which is due
11 to OHEP office May the 30th, and then there's a second
12 part that's due on July the 3rd of each program year.
13 The Independent Annual Financial Audit Report, which I
14 believe Lindsay already spoke on as well, is the first
15 Monday in May of each year.

16 Your Fuel Consumption Survey is due the third
17 Wednesday in June of each year, and then the Monthly
18 Outreach Log, which is due the first Friday of the
19 following month.

20 With the Outreach Plan, she wasn't able to
21 make it today. You will be notified as your contact

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1 person for your outreach, where your paperwork should be
2 sent or emailed to each month, with that person which is
3 Blessing -- Blessing Gunden (phonetic), and I believe
4 that is going to be it for the deliverables that are
5 required.

6 MS. WILLIS-GRAY: Thank you all. Now we're
7 going to go over Section 4, Proposal Format. Before we
8 begin this section, I just want to make a reminder that
9 proposals are due at the specified date and time listed
10 in the RFP. Please keep in mind, any late proposals
11 will not be accepted. That time will be November 5 at
12 2:00 p.m. Okay?

13 The proposal is a two-part submission. If
14 you're following along, this can be found on page 50 of
15 the RFP. The offeror shall submit proposals in two
16 separate volumes. Volume One includes the Technical
17 Proposal; Volume Two includes the Financial Proposal.
18 It is preferred that the name, email address, phone
19 number of the offeror be included on the outside of the
20 package of each volume. Each volume shall contain one
21 original and five identified copies.

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1 It is preferred that the two sealed volumes
2 are submitted together in a single package with the
3 label that has the RFP title and number, jurisdiction,
4 or jurisdictions relevant to the proposal, name and
5 address of the offeror, and closing date and time for
6 receipt of -- for proposals. And the proposal's due
7 date and time -- November 5, no later than 2:00 p.m. to
8 the address listed in Section 1.5 of the RFP.

9 The RFP can be submitted in person or by mail.
10 The Department recommends if you choose to send it by
11 mail, send Express, Priority, or Certified Mail. These
12 are the only forms in which the date and time of the
13 receipt can be verified by the Department. Any
14 proposals received after the closing date and time will
15 not be accepted.

16 The Technical Proposal is found in Section 4.4
17 on page 51, provides detailed information about the
18 submission and format of Volume One. No pricing
19 information is to be included in the Technical Proposal.
20 Inside a sealed package as described in Section 4.2
21 should be one original and five copies, with an

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1 electronic version. An offeror submitting proposals for
2 more than one jurisdiction shall produce one Technical
3 Proposal, regardless of the number of jurisdictions
4 proposed to serve. If there are any variations in
5 service delivery based on jurisdiction nuances, those
6 variations shall be described in detail on a separate
7 page for each jurisdiction so affected, and appended to
8 the Technical Proposal.

9 Section 4.4.2 describes the order of the
10 sections provided in the Technical Proposal. Tab A,
11 title page and table of contents; Tab A1, claim of
12 confidentiality; Tab B, transmittal letter; Tab C,
13 Executive Summary; Tab D, minimum qualifications
14 documentation; Tab E, offer of technical response to RFP
15 and proposed work plan; Tab F, experience and
16 qualifications of proposed staff; Tab G, offeror
17 qualification and capabilities; Tab H, references; Tab
18 I, list of current or prior State contracts; Tab J,
19 financial capability; Tab K, certificate of insurance;
20 Tab L, subcontractors; Tab M, legal action summary; Tab
21 N, economic benefit factors; and Tab O, additional

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1 required technical submissions.

2 The Technical Proposal should also reference
3 the organization and numbering of the sections of the
4 RFP.

5 The Financial Proposal should be in a sealed,
6 cover, separate from the Technical Proposal, and clearly
7 identified in the format identified in Section 4.2.

8 The offeror shall submit an original with five
9 copies, and electronic version. The Financial Proposal
10 shall contain all price information in the format
11 specified in Attachment F. The offeror shall complete
12 the Financial Proposal only as provided in the Financial
13 Proposal instructions and a Financial Proposal form
14 itself. The price quoted in the Financial Proposal form
15 may not increase by more than three percent over the
16 prior year for each year of the contract term following
17 the first contract year, as well as for each year for
18 the option period if it is exercised.

19 An offeror submitting proposals for more than
20 one jurisdiction shall produce a separate Financial
21 Proposal for each jurisdiction, and it should be

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1 provided in a separate sealed envelope and labeled with
2 the jurisdiction.

3 Section 5 begins on page 60. This goes over
4 the Evaluation Committee, the evaluation criteria, and
5 selection procedure. Evaluation of proposals will be
6 performed in accordance with COMAR 21.05.03, by a
7 committee established for the purpose of and based on
8 the criteria set forth in Section 5.2, Technical
9 Proposal Evaluation Criteria, and 5.3, Financial
10 Proposal Evaluation Criteria of the RFP.

11 The Technical and Financial Proposal
12 evaluation criteria is listed in Section 5.2. The
13 criteria for the Technical Proposal will be evaluated in
14 the following order -- offeror's technical response to
15 RFP requirements and work claim, experience and
16 qualification of proposed staff, offeror qualifications
17 and capabilities, included proposed subcontractors, and
18 economic benefit to the State. Each criterion has equal
19 weight.

20 All qualified offerors will be ranked from
21 lowest, most advantageous, to highest, least

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1 advantageous price based on the total proposed price
2 within the State guidelines set forth in the RFP, and as
3 submitted on Attachment F of the Financial Proposal
4 form.

5 The contract will be awarded in accordance
6 with the competitive sealed proposals method. The State
7 may conduct discussions with offerors that have
8 submitted proposals that are determined to be reasonably
9 acceptable of being selected for contact award or
10 potentially so. However, the State reserves the right
11 to make an award without discussions.

12 In either case, the State may determine the
13 offeror to be responsible and/or offeror proposal not to
14 be responsible of being selected for award without
15 discussions. If it is found at that time that you are
16 not susceptible for award, the Financial Proposal will
17 be returned if it is unopened.

18 Award determination is determined once -- upon
19 completion of the Technical Proposal and Financial
20 Proposal evaluations and ranking. Each offeror will
21 receive an overall ranking. The Procurement Officer

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1 will recommend award of the contract to the responsible
2 offeror that submitted the proposal determined to be the
3 most advantageous for the State. Both the proposal
4 technical factors and financial factors carry equal
5 weight.

6 This concludes the review of the RFP. We are
7 ready to take questions. Before we actually start, I
8 just wanted to make aware that prior to the RFP coming
9 out there was a change made to the living wage. The
10 wages have increased, so there will be an amendment
11 three made to the RFP which will be posted to eMaryland
12 Marketplace and DHR's website.

13 When asking questions, we'd just ask that you
14 identify yourself and your company for the record, and
15 again, a transcript of the conference will be made
16 available on eMaryland Marketplace and DHR website.

17 Does anyone have any questions?

18 MS. BENHAM: Hi. I'm Ann Benham with Allegany
19 County Human Resources Development Commission. The
20 contract year it says is starting April 1st. We're
21 currently in a seven month extension. What I need to

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1 know is is that seven months rolling into the new --
2 like when this thing starts, are we rolling this into
3 this, or is this the seven months stand alone and we're
4 just starting at the April 1st with the whole -- the
5 year would basically be changing?

6 MS. WILLIS-GRAY: Your program year would be
7 changing.

8 MS. BENHAM: Okay. So this seven month
9 extension that we're in is its own thing?

10 MS. WILLIS-GRAY: It's its own. It's a
11 separate --

12 MS. BENHAM: Thank you.

13 MS. BARSE: Just a quick question. Tina
14 Barse, Washington County Community Action Council. I
15 have a couple of questions. The first question I have
16 is in the RFP it talks about the State business hours
17 are 8:30 to 5:00, if I remember correctly, and our
18 agency is open 8:30 to 4:30. Do we need to extend our
19 hours to accommodate the State working hours?

20 MS. WILLIS-GRAY: The RFP does state that
21 should be available during normal State business hours.

1 MS. BARSE: The next question I have, in
2 Section 2 it talks about references -- business
3 references. Those business references, I understand
4 that Section, but then we go to Section 4, it talks
5 about client references are -- it talks a little bit
6 about this reference can't be the same. I'm trying to
7 understand what the client references -- how they differ
8 from the business references.

9 MS. WILLIS-GRAY: What we can do is we can
10 take down your question and we'll follow-up with you on
11 eMaryland Marketplace and DHR website.

12 MS. BARSE: All right. I have one last
13 question. I'm sorry. We have State supplied equipment.
14 Now I understand that if you don't receive the RFP
15 award, that equipment will be gone. But if we do
16 receive that award, does that equipment stay with us?
17 Are we able to keep that equipment and maintain that
18 equipment, or do we have to purchase new equipment? If
19 so, then I'm sure over time it's going to be placed,
20 but, you know, as a start-up?

21 MS. WILLIS-GRAY: In regards to the current

1 equipment, you would want to defer to the State Project
2 Manager for the current contracts. What we can do is
3 follow-up with you in regards to at the end of the
4 contract what would happen with that equipment.

5 Are there any other questions? Well thank you
6 everyone for coming out today. As a reminder, please
7 submit your proposals by the due date and time, and
8 because if it is late it will not be accepted. If you
9 have not already done so, please sign in at the front so
10 that we can record your attendance, and this now
11 concludes the Pre-Proposal Conference for the
12 Administration of the Maryland Energy Assistance and
13 Electric Universal Service Programs. Enjoy the rest of
14 your day.

15 Oh, I'm sorry. I think we have one more
16 question.

17 UNIDENTIFIED SPEAKER: Is there going to be a
18 handout available? We didn't receive a handout when we
19 arrived.

20 MS. WILLIS-GRAY: We can make an additional
21 copy for you.

1 UNIDENTIFIED SPEAKER: Thank you.

2 MS. HUNTLEY: On page 15 -- I'm Gretchen
3 Huntley with Anne Arundel County Community Action --
4 1.14, Public Information Act Notice. For confidential -
5 - how specific does that need to be?

6 MS. WILLIS-GRAY: Any information that you
7 deem as confidential would need to be included on that
8 under Tab A1. It needs to be as specific as you want it
9 to be.

10 MS. HUNTLEY: Okay. Thank you.

11 MS. BALZ: Another question. If you are
12 applying for more than one jurisdiction, would you need
13 more than three references or would two references do
14 for the --

15 MS. WILLIS-GRAY: The number of references
16 will remain the same. If you're applying for more than
17 one jurisdiction, you're using the same proposal, but
18 any different information needs to be included in the
19 addendum.

20 MR. BURKE: I'm sorry to delay the questions
21 further --

1 MS. WILLIS-GRAY: That's okay. I'm sorry --

2 MR. BURKE: Carl Burke with Washington County
3 Community Action Council. The references, are they
4 typically to take the form of letters of support, or are
5 they simply references with contact information?

6 MS. WILLIS-GRAY: It could be either -- or let
7 me get back to you on that in regards to that question.

8 MR. CHANG: And you can -- I'm Hubert Chang,
9 Assistant Attorney General. I just wanted to clarify
10 that on the confidential information question that it
11 does -- there is a requirement that it is identified by
12 page and section number, and that you identify your
13 confidential and proprietary information on the page
14 after the -- of your proposal.

15 MS. WILLIS-GRAY: Are there any additional
16 questions or any clarifications that are needed? Also,
17 just wanted to make a reminder that in order to receive
18 a contract award, a vendor must be registered on
19 eMaryland Marketplace. Our guidelines can be found on
20 eMaryland Marketplace, so please if you plan to bid, or
21 if you plan to put in for a proposal, please register

1 for eMaryland Marketplace.

2 And that concludes our Pre-Proposal

3 Conference. Everybody have a wonderful day.

4 (At 10:55 a.m. the meeting concluded.)

