MARYLAND DEPARTMENT OF HUMAN SERVICES
PRE-PROPOSAL CONFERENCE
FIA/OHEP 21-007-S

ADMINISTRATION OF THE MARYLAND ENERGY ASSISTANCE PROGRAM (MEAP)
AND THE ELECTRONIC UNIVERSAL SERVICE PROGRAM (EUSP)

Via Google Meet

December 16, 2021
1:00 p.m.

ATTENDANCE:

AGENCY:

Henry ThorStraten, DHS, Procurement Officer
Lauren Molineaux, Director, MEAP, OHEP
Delora Crutcher, DHS, Procurement Office
Kenneth Jessup, Hiring Agreements
Sang Kang, DHS, Procurement Division
Rick Glassband, Office of the Attorney General
ATTENDEES:

William Barclay, Shore Up
Marica Chrysostome, Shore Up
Tonet Cuffee, Neighborhood Service Center, Talbot County
Donna Forrest, Delaware Energy Assistance Program for Catholic Charities in Delaware
Adam Hiob, Harford Community Action Agency
Cathy Lucich, Harford County Action Agency
Maria Morris, Shore Up
Marilyn Neal
Kim Neely, Senior Director, Harford Community Action Agency
Pamela Overbaykriss, Harford Community Action Agency
Lisa Schieffert, Program Operations Director, Catholic Charities Delaware and Maryland Eastern Shore
Jenn Trager, Program Manager, Catholic Charities, Princess Anne
Lisa Zimmerman, Energy Assistance Director, Harford County Action Agency

ALSO PRESENT:

Shanise Smith, Family Investment Administration
Lisa Turnage, Family Investment Administration

Reported by: Carol O’Brocki, Notary Public
Hunt Reporting Company
MR. THORSTRATEN: Good morning. Welcome to the Pre-Proposal Conference for the Administration of the Maryland Energy Assistance Program (MEAP) and the Electronic Universal Service Program (EUSP).

My name is Henry ThorStraten and today we’ll be presenting information about the RFP. We will also try to answer questions that you may have concerning this solicitation.

MR. GLASSBAND: Sorry to interrupt.

MR. THORSTRATEN: Yes?

MR. GLASSBAND: Is this being transcribed?

MR. THORSTRATEN: It is.

MR. GLASSBAND: You can turn that recording off (indiscernible).

MR. THORSTRATEN: No, we usually do it. It’s also helpful when I’m checking names and information for -- unless there’s a legal reason why you want me to turn it off.

MR. GLASSBAND: Well, I mean, I have an
experience where we use the actual Google record if we’re transcribing. So, that’s all.

MR. THORSTRATEN: Okay. We’re going to try to answer your questions. The agenda for this conference, by the way, is attached and available for download in the Google Meet.

Please note that this conference is being recorded and transcribed by Hunt Reporting Company. When asking questions later please clearly state for the record your name and the name of your company.

A transcript of this conference will be made available on eMaryland Marketplace Advantage and the DHS website. Please use the chat feature to type in your organization’s name, the names of those attending today, and your contact information. This assists us when making the transcript and I will read from this when I ask you to introduce yourselves.

Okay. Please keep yourself muted unless identifying yourself during roll call or when asking a question if you’re being called on so that everyone can hear during the meeting. If I hear background noise
during the presentation I’ll attempt to mute the open
mike.

Let’s begin the conference with introductions. I’ll begin with the Department of Human
Services staff and let them introduce themselves, and then I’ll call on the conference’s attendees. I’m
Henry ThorStraten and I am the procurement officer for this solicitation. Joining me from Procurement is
Delora Crutcher.

MS. CRUTCHER: Good afternoon everyone.

MR. THORSTRATEN: From the Family Investment Administration are Lauren Molineaux, Lisa Turnage, and
Shanise Smith.

MS. MOLINEAUX: Good afternoon. Thank you.

MS. TURNAGE: Good afternoon everyone.

MS. SMITH: Hello everyone.

MR. THORSTRATEN: From the Office of the Attorney General is Rick Glassband.

MR. GLASSBAND: Hello.

MR. THORSTRATEN: And from DH Hiring Agreements is Kenneth Jessup.
MR. JESSUP: Good afternoon everybody.

MR. THORSTRATEN: Okay. Now I’m going to call on the attendees but nobody seems to be using the chat. So, let’s try a different way. I’ll just look at my screen and see who I can identify that way.

There’s a phone number that’s 1-302 and then ends with 01. Could you introduce yourself?

(No response.)

MR. THORSTRATEN: Okay. Chura Palsi (phonetic) could you introduce yourself?

MS. FORREST: I’m sorry. I’m here. My name is Donna Forrest. I was struggling to get into Google so that’s why I dialed in.

MR. THORSTRATEN: That’s not a problem.

MS. FORREST: My name is Donna Forrest -- F-O-R-R-E-S-T and I’m the Delaware Energy Assistance Program Manager for Catholic Charities in Delaware.


MR. BARCLAY: This is William Barclay with Shore Up, and Maria Morris with Shore Up, and Marica
Chrysostome with Shore Up.

MR. THORSTRATEN: Okay. Tonet Cuffee, can you please introduce yourself?

MS. CUFFEE: Good afternoon. I’m Tonet Cuffee. I’m with the Neighborhood Service Center in Talbot County located on the Eastern Shore.

MR. THORSTRATEN: Okay. Thank you. And actually I’m going to switch over and go down my people list. So, 1-410 and then ends with 42, can you introduce yourself?

(No response.)

MR. THORSTRATEN: Okay. Cardeaner Robinson, or Cordeaner Robinson?

MS. CUFFEE: It’s Cardeaner Robinson. She is the OHEP director at the Neighborhood Service Center here in Talbot County.

MR. THORSTRATEN: Okay. Thank you. Carol O’Brocki?

THE REPORTER: Hi, everyone. I’m Carol O’Brocki from Hunt Reporting Company. I’m recording and I’ll be making the transcription of your Pre-
Proposal Conference.

MR. THORSTRATEN: Thank you.

THE REPORTER: Thank you.

MR. THORSTRATEN: Gail Huna?

MS. HUNA: Hi. This is Gail Huna from Harford Community Action Agency along with Adam Hiob and Pamela Overbaykriss.

MR. THORSTRATEN: Okay. Thank you. Jenn Trager?

MS. TRAGER: Hi. It’s Jenn Trager. I’m program manager with Catholic Charities in their Princess Anne location.

MR. THORSTRATEN: Okay. Kim Neely?

MS. NEELY: Hello. I am Kim Neely. I’m the senior director for Harford Community Action Agency in Harford County, Maryland.

MR. THORSTRATEN: Thank you. Lisa Schieffert?

MS. SCHIEFFERT: Hi. I am the program operations director for Catholic Charities Delaware and Maryland’s Eastern Shore.
MR. THORSTRATEN: Thank you. Lisa Zimmerman?

MS. ZIMMERMAN: (No response.)

UNIDENTIFIED SPEAKER: I’ll answer for Lisa. They were having technical difficulty. Lisa is Harford Community Action Agency’s Energy Assistance director.

MR. THORSTRATEN: Okay. Thank you. And then in case I missed anyone, is there anybody who needs to speak up?

(No response.)

MR. THORSTRATEN: Okay. If you have not added your name and information to the chat, please do so now or during the meeting. When I call on you, please say your name and the name of your organization again. Only one representative of each organization needs to speak at this time; however, please submit the name of everyone in your organization. Okay.

So I’m going to put those names in. They’ll be used later when we do the transcript, and they’re very handy.

A reminder before we move on, there will be
opportunities to ask questions after Section 3 and after Section 6.

Opening remarks will be made by Lauren Molineaux, director of the FIA, Office of Home Energy Programs. Lauren?

MS. MOLINEAUX: Good afternoon. Thank you, Henry. Can you hear me okay?

MR. THORSTRATEN: I can.

MS. MOLINEAUX: Okay. Excellent. Thank you.

I am calling in in the office and the phone here is a little wonky, if you will.

Good afternoon. My name is Lauren Molineaux and I’m the director of the Office of Home Energy Programs. With me -- I’m joined by Lisa Turnage, our assistant director, and Shanise Smith, a program analyst, both in the office.

As you may not know, the Office of Home Energy Assistance provides bill assistance to low income households in the State of Maryland to help make their energy costs more affordable and to help with the prevention of loss and also the restoration of home
energy service.

The bill assistance is provided in the form of multiple different programs such as MEAP, which assists with heating bills; EUSP, which assists with electric bills; and Arrearage Retirement Assistance which helps customers with large past due electric and gas bills.

OHEP is requesting services for the administration of the program within five jurisdictions -- that is Harford County, Somerset County, Talbot County, Wicomico, and Worcester County. The services will include outreach activities, application intake, certification for benefits, payment processing, notification of eligibility determinations, and appeals of benefits or benefits denial.

There may be instances where you are submitting a proposal for more than one jurisdiction, and you may receive an award for more than one jurisdiction.

Henry, would you like to -- am I next on the agenda?
MR. THORSTRATEN:  No.  I do the minimum qualifications and then you speak.

MS. MOLINEAUX:  Okay.  Well, then I will send it back to you.

MR. THORSTRATEN:  Okay.  Thank you.  We will now present an overview of the RFP.  We will only present parts of the solicitation but feel free to ask questions about anything in the RFP.

Section 1 of the RFP is Offeror Minimum Qualifications.  As part of the determination to be considered reasonably susceptible of being selected for award, the offeror must document in his proposal that within the last seven years the following minimum qualifications have been met.

The offeror shall have prior experience in administering enrollment and eligibility services for low income benefit programs.  Required documentation, as part of meeting this requirement the offeror shall provide with his proposal three business references from the past seven years able to attest to the offeror’s experience regarding enrollment and
eligibility services for low income benefit programs.
 Those are the minimum qualifications for the RFP.

Now Lauren will present Section 2, Contractor
Requirements, Scope of Work, and Section 3, Contractor
Requirements, General.

MS. MOLINEAUX: Okay. Thank you. So
contractor requirements, you are going to be
responsible for helping low income households pay their
utility and fuel bills by minimizing energy-related
crises and making heating or cooling costs more
affordable through a comprehensive package of
activities including monitoring benefits to reduce the
energy burden, provision of linkages between community
resources and customers, the promotion of energy
conservation, and helping the customer understand his
or her financial responsibility for household energy
needs, as well as improving service to all geographic
areas of the jurisdictions to be served.

These are expected to be provided through the
OHEP data management system and eventually MDTHINK
Eligibility and enrollment system, and that would be a
change that may take place at the end of this contract base year.

The contractor will be responsible for completing the annual outreach plan and reporting on outreach activities each month, and then also focusing outreach activities on eligible households and complying with the intake process as described under the COMAR regulation that regulates the application process for energy assistance benefits.

The offeror would be accepting applications through the entire program year through a variety of different methods which is mail, online, or in-person. They would also be responsible for conducting interviews and explaining other programs outside of the OHEP purview that relates to energy assistance services.

The offeror will be expected to process an application within seven days of receipt, and then, of course, follow all subsequent eligibility determinations as outlined in the OHEP Operations Manual, using our OHEP data management system.
Once the application is processed, the offeror will be required to complete the payment processing component where they would be complying with the procedures established in the OHEP process manual, and using the OHEP data management system to do so. They would be required to reconcile and report on a monthly basis the amount of benefit payments made, and make any necessary adjustments for whatever reason necessary.

They will also be responsible for issuing benefit payments through the contractor’s fiscal system to bulk fuel providers and issue direct payments to landlords and applicants based on the energy delivery statements. They will also be responsible for the recovery of any overpayments and assisting the State in identifying and collecting unreturned overpayments due to fraud or any other errors.

Part of the requirements include being ready to step in during MEAP crisis season. MEAP’s crisis season runs from November 1st to March 31st of each program year. During the crisis season each contractor
will be required to provide home heating assistance on an expedited basis. The contractor will be required to ensure that assistance is provided if a household is experiencing an energy emergency, and they have less than four days’ supply of heating fuel or the primary home’s heat source has been disconnected or there is a disconnection notice.

The contractor will within 48 hours of receipt of a qualified application restore and ensure the maintenance fuel suppliers and utility services repairs or any other services needed to ensure that heating is restored to the household is completed. The contractor will also refer all applicants who are ineligible for assistance to any other agencies for relevant related assistance. This plan would be submitted with your technical proposal.

It goes without saying but, of course, the utilization of fraud. We need to make sure that we are following all guidelines that are within our procedures manual to minimize the opportunity for fraud.

Fiscal reporting -- we have a number of
reports that are required. We require a monthly MEAP report, a monthly administrative fund report, an end-of-the-year closeout report, and an annual independent financial audit report. More details can be found in the RFP.

Additionally there are other reportings that are a little bit less formal but are still required nonetheless, and that would be things such as your outreach loss monthly would be turned into the OHEP Central Office, the annual outreach plan, and the annual OHEP energy crisis plan, and then, of course, being open and responsive to any reasonable ad hoc report request. Each contractor will cooperate with any monitoring that is done by the OHEP Central Office.

For training, the contractor will ensure that your personnel are trained as described in Section 2.2, and making sure that at least one project manager and one other staff attends our annual training, which is a two-day meeting. The cost for attending this is to be considered once submitting your financial proposal.

We also request that the contractor notify
the customer of their fair hearing rights and take appropriate action in supporting the submission of any appeal should a customer decide to do so.

If we scroll down into Section 2.4 we could go through all of the deliverables but I pretty much just read them to you so I will not do that. But with that, I believe I am now moving on to Section 3. I think that’s my next point in the agenda. Is that correct, Henry?

MR. THORSTRATEN: That’s correct.

MS. MOLINEAUX: Okay. Thank you. So Section 3, Contractor Requirements, so the end of contract transition is going to require the contractor to provide support leading up to that end of the contract so that we can promptly and timely transition in accordance with whatever the transition span looks like, whether it’s the end of the contract or continuing on.

A transition-out plan will address a minimum thing that may consider some of the following but are not limited to the following: staffing concerns,
issues related to the close out, communications, importantly security and system access, hardware and software inventory, et cetera. Also worth noting is knowledge transfer in the event that the work is transferred to a different entity.

The Return and Maintenance of State data, that’s pretty self-explanatory, but upon termination of the expiration of the contract term all of the State data would need to be returned in a mutually agreed format to maintain all security requirements.

As it relates to invoicing, the contractor will email the original of each invoice and signed authorization to the contract monitor. That would be yours truly. And all invoices for services shall be verified by the contractor as accurate once you have submitted that. So the submission is your verification that the invoice is accurate. We will not process any invoices that do not meet the following requirements outlined in Section 3.3. They’re pretty standard invoicing requirements.

The Department does reserve the right to
reduce or withhold contract payment in the event that
all deliverables are not completed or there are other
breaches or terms in the conditions of the contract.

While the State is generally exempt from
Federal excise taxes, the contractor is not and may be
liable for such sales and use taxes. Invoices for
final payment shall be clearly marked and final and
submitted when all of our requirements have been
completed and no further charges are to be incurred
under the contract.

In no event shall any invoice be submitted
later than 60 calendar days from contract termination
date, and we request that invoices are submitted by the
15th day of each month and payment shall be made based
upon one quarter of each annual contract amount.

Section 3.3 goes into a list of why the
contract may not be deemed payable, or an amount may
not be deemed payable, which I will not read through
all of these but they are there for you to take a look
at. Travel will not be reimbursed under this RFP.

One of the requirements that we ask of the

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contractor is a disaster recovery and data plan, so ensuring that you have a plan for any concerns that relates to redundancy, data backup, and disaster recovery. We are seeing more and more of that lately, and so we want to make sure that we are paying special attention to having the correct measures in place to make sure that we have a robust contingency and disaster recovery plan in place, and then also making sure that we are able to provide services in the event of disruption regardless of what the cause is. I think we all can agree we went through that about -- well, just two years ago.

Data Export and Import -- the contractor shall perform a full or a partial import of the State data within 24 hours of request, and then also provide to the State the ability to import and export data at will and any access which are needed to import or export the data.

All data, databases, and data derived or directly purchased as a part of the RFP are the property of the State. The purchasing State agency is
considered the custodian of the data, so OHEP would be
then responsible for determining the use, access,
distribution, and any other conditions based on
appropriate State statutes and regulations.

We ask that the contractor limit access to
and possession of State data, to only those whose
responsibilities require such access, and will train
those individuals in the confidentiality obligation.

At no time shall any data or a process that
belongs to or is intended for use of the State be
copied, disclosed, or retained by the contractor or any
party for subsequent use of any transactions that does
not include the State, and the contractor shall not use
any information collected in connection with the
services furnished under the contract for any purpose
other than fulfilling the services as described earlier
today.

3.6 describes Insurance Requirements, so I
will not go into those in detail, and 3.7 is an
exhaustive list of what we deem are acceptable security
requirements, and these are both for employees,
security and clearance, criminal background checks,
onsite security requirements, and also information,
technology, security. So four different types of
security, if you will. You can read more there in
Section 3.7.

Also in 3.7 and what the State expectation is
for data protection and control, and security logs and
report access. I think at the top of a lot of folk’s
minds right now is the current security breach that our
friends over at MDH are facing so we want to make sure
that we are paying specific attention to this and
prevent any opportunity for such occurrences to happen
through this contract.

In the event that there is a concern or a
problem that needs to be escalated, 3.8 discusses the
Problem Escalation Procedure and what things they
expect as far as what the contractor would need to do
in the event that a problem arises and it needs to be
addressed. This goes into details here about the time
frame and what you would expect to hear about any
issues that are of concern and the related tests of the
Problem Escalation Procedure.

The rest of Section 3 really goes through additional IT requirements and what is considered private and confidential information and how we expect that to be handled. There’s a lot of IT information that as I often tell folks I am a horrible millennial in that I am not IT savvy, so you are better off reading exactly what the expectation is than hearing it from me.

With that, I believe that concludes -- no, I have a few more parts on Section 3. I’m sorry. I was going to hand it back over to you, Henry. See how excited I was?

So Section 3.1 we go through the Experience and Personnel, what our expectation is there and what we will be giving special consideration to. So I’d like to point out that we will give special consideration to agencies that received funding under the Economic Opportunity Act of 1964 for low income energy assistance or weatherization services, and the offeror shall have a minimum of three years prior
experience in administrative enrollment and eligibility
services for a low income benefit program.

Key Personnel Identified, we would want to
know who your program director is. They are required
to have three years of experience supervising
eligibility and enrollment services and any
substitution of personnel to do continuous work.

The contract monitor may direct the
contractor to replace any contract personnel who in the
sole discretion of the contract monitor are perceived
as being unqualified, non-productive, unable to fully
perform the job duties, disruptive, or known or
reasonably believed to have committed a major
infraction of law, DHS policies, or contract
requirements. There’s more information about what the
expectation there is, and then the rest is for the most
part not applicable, but I will touch on the
solicitation prior to its end within 30 days or after
contract execution.

Prior to contract execution or within 30 days
after, the offeror may not substitute proposed key
personnel except under specific circumstances which are outline in 3.11.5.

The last piece that I would like to touch on is the No-Cost Extension and in accordance with a BPW Advisory. In the event that there are unspent funds remaining on the contract, the procurement officer may modify the contract to extend the contract beyond its expiration date for a period up to but not exceeding one-third of the base term of the contract for the performance of work within the scope of work.

With that, I will hand it back over to you, Henry. I think it’s your turn.

MR. THORSTRATEN: Thank you. At this point we will take questions. Please state in the chat that you have a question. You don’t need to fill in all your information at that point. Just give me something I can look at and call people out one at a time. I’ll give anyone who has phoned in a chance to ask questions, as well.

When I call on you to ask your question please state your name and the name of your company,
and then I know you will be listening to questions and responses here, but after this is over and it’s back to me reading, if you could go ahead and put your company information in and your phone number and contact information that’s really important, especially to me, because sometimes you will reach out to me by phone and leave a message on my machine, and our phones at work are not that great. So if I have something that I can look up who exactly it was who left their name and what their complete phone number is as opposed to the part that dropped out when they were leaving it, that is just so helpful to me.

So after the questions, go ahead and put your information into the chat. So for now, just drop in chat that you have a question and I’ll call on you.

Okay. And if there is some problem where -- oh, great. Donna Forrest, you have a question. I think you need to unmute.

MS. FORREST: Is the data held in a Maryland State computer system or is that something that the contractor would have? I listened to all of the
security comments and I don’t know if -- would the
contractor’s employees like dial into a VPN where it’s
a secure system, or is it something that the contractor
would need to worry about?

MR. THORSTRATEN: Lauren, can you address
that?

MS. MOLINEAUX: Sure. Yeah, so the
contractor would need to have access to our State’s
system through a secured gateway, I guess, VPN
(indiscernible) that I am not an IT wonk (phonetic).
But we do hold the data through our own data management
system that your staff would then need to access
through a secure access point like VPN.

MS. FORREST: Okay. So, and I asked that
question because you talked about data breaches and it
would be difficult for someone to breach that data
unless they hacked into a State system. Well, that was
my question. Thank you.

MR. THORSTRATEN: Okay. Well, we can get
back to you in writing on that one. Is there anybody
else? Is there anybody on a phone who has a question?
MR. THORSTRATEN: You guys have no questions?

Okay. I’m going to move ahead but there will be a second question and answer period at the end so when we come to that point you can ask questions about any part of the RFP, not just the part I’ll be reading next.

Okay.

I’m going to continue with presenting the RFP. Section 4 is Procurement Instructions. Proposals are to be submitted through eMMA. Hard copy submissions are not permitted for this solicitation.

The RFP Conference Summary and Attendance Sheet Questions and Responses addenda and other solicitation-related information will be made available via eMMA.

In order to receive a contract award, a vendor must be registered in eMMA. All questions shall be submitted via email to the procurement officer no later than the date and time specified on the Key Information Summary Sheet. As of now that is January 6, 5:00 p.m.

Answers to all questions that are not clearly...
specific only to the requester will be posted on eMMA. Generally if you’re asking a question and I’m answering you, I’m answering everybody. So that’s why the answers are -- the questions and answers are posted into our questions and responses post in eMMA.

4.4 Procurement Method, the contract will be awarded in accordance with a competitive sealed proposals method under COMAR 21.05.03. Proposals must be received by the procurement officer no later than the proposal due date and time indicated on the Key Information Summary Sheet. That is January 17th by 3:00 p.m. in order to be considered.

Requests for extension of this date or time shall not be granted. Proposals received after the due date and time will not be considered. Proposals may be modified or withdrawn before the time and date for receipt of proposals. Proposals may not be submitted by email or facsimile. Proposals will not be opened publicly.

4.6, Multiple or Alternate Proposals will not be accepted. 4.7, Economy of Preparation, proposals
should be prepared simply and economically and provide a straightforward and concise description of the offeror’s proposal to meet the requirements of this RFP. 4.8.1, the offeror shall give specific attention to the clear identification of this portions of this proposal that it considers confidential and provide justification why such materials should not be disclosed by the State under the Public Information Act.

Contracts for each jurisdiction shall be awarded to the responsible offeror submitting the proposal that has been determined to be the most advantageous to the State considering price and the evaluation factors set forth in this RFP. Offerors may be required to make oral presentations to State representatives. Oral presentations are considered part of the technical proposal.

If the RFP is revised before the due date for proposals, the Department of Human Services shall post any addenda to the RFP on eMMA. There remains the responsibility of all prospective offerors to check

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eMMA for any addenda issued prior to the submission of proposals.

eMMA, if some of you have not used eMMA yet, eMMA works as rounds, so when I post the questions and response or I post an amendment to the RFP, that’s a round in eMMA. So if you have, for instance, submitted your proposal early and think you’re done, and then I post some questions and responses, that is a new round and you need to watch that because you’ll need to post your proposal again within that new round. So you do need to watch eMMA through the course of this solicitation to make sure that you have posted to the (indiscernible) round as posted.

Acknowledgment of the receipt of all addenda for this RFP issued before the proposal due date shall be included in the transmittal letter accompanying the offeror’s technical proposal. Failure to acknowledge receipt of an addendum does not relieve the offeror from complying with the terms, additions, deletions, or corrections set forth in the addendum, and may cause the proposal to be deemed not reasonably susceptible of
being selected for award.

Offerors must be able to provide all goods and services and meet all of the requirements requested in this solicitation and the successful offeror shall be responsible for contract performance including any subcontractor participation.

By submitting a proposal in response to this RFP, the offeror, if selected for award, shall be deemed to have accepted the terms and conditions of this RFP in a contract attached hereto as Attachment M. 4.21, before a business entity can do business in the State it must be registered with the State Department of Assessments and Taxation, SDAT.

It is strongly recommended that any potential offeror complete registration prior to the proposal due date and time. The offeror’s failure to complete registration with SDAT may disqualify an otherwise successful offeror from final consideration and recommendation for contract award, and I will tell you that SDAT, because of Covid, has had a backup so I do recommend that you address this as soon as you can.
Section 4.25.4, the offeror or potential offeror may use eMMA or email to submit proposals in eMMA only, ask questions regarding solicitation, reply to any material received from the procurement officer by electronic means, but only on the terms specifically approved and directed by the procurement officer.

4.26, there is no MBE subcontractor participation goal for this procurement, and then there is no VSBE participation goal for this procurement.

At this time the Maryland living wage requirements will be presented by Delora Crutcher.

Thank you, Delora.

MS. CRUTCHER: Oh, you’re welcome, Henry.

Good afternoon again. I will be sharing information with you regarding Maryland’s living wage law, which have been in effect since October 1st, 2007. The Maryland living wage law requires certain contractors and subcontractors to pay a minimum wage rate to its employees.

Working under certain State services contracts, a solicitation for services under a State
contract valued at 100,000 or more, or for contractors
with ten or less employees may be subject to this law,
which is under the Title 18 of State Finance and
Procurement Article, Annotated Code of Maryland.

The current Maryland living wage law is 14.55
per hour if the State contract service value at 50
percent or more of the total value of the contract is
performed in a Tier 1 area. If the State contract
services value at 50 percent or more of the total value
of the contract, it is performed in the Tier 2 area.

Then you pay each covered employee at least $10.93 per
hour. The specific living wage rate is determined by
whether the majority of the service take place in Tier
1 or Tier 2 of the State.

The Tier 1 areas include Anne Arundel,
Baltimore, Howard, Montgomery, and Prince George’s
counties and Baltimore City. The Tier 2 area includes
any county in the State not included in Tier 1 area.

If your business has operations in areas with
two different tiers, the wage you pay is determined by
the area which 50 percent or more of the contract value
is performed. If the employees who perform the
services are not located in either Tier 1 or Tier 2,
the living wage rate will be based upon the majority of
the recipients of the service are located.

Additional information regarding Maryland’s
living wage requirement is obtained in Attachment F of
the RFP which is entitled Maryland Living wage
Affidavit of Agreement for the Service Contracts.

Information may also be found on the Maryland
Department of Labor website -- labor.maryland.gov.
Click “Labor” in the tab’s labor wages in the office
heading, then click link for the frequently asked
questions. This will take you to the page entitled
“Maryland Living Wage Frequently Asked Questions,
Living Wage for the State Service Contracts.”

The living wages rate are subject to an
annual adjustment by the Department of Labor. However,
your prices under the contract may not change because
of any living wage adjustments. Thank you.

MR. THORSTRATEN: Thank you very much,
Delora. At this time, Kenneth Jessup will present
information on the Maryland Hiring Agreement.

MR. JESSUP:  Good afternoon, everybody. Give me one second. I want to share my screen. All right. Give me one second, guys. I apologize.

MR. THORSTRATEN:  No problem. Take your time.

MR. JESSUP:  What I want to do is just take you to the website that shows the Board of Public Works and talks a little bit about the hiring agreement, and I’m getting ready to do that in just one second, as soon as I can get it pulled up. I apologize for the wait.

But in short, the hiring agreement is the opportunity for family investment participants to be able to collaborate with State contractors (indiscernible) to the opportunity to apply for a position if the State contractor has a position available with the contract with the State Department of Human Services or a local Department of Social Services agency. And I’m going to show you the page right now.
So this is actually the Board of Public Works advisory page. This is actually listed online. I can drop the link in the chat for you if you want to look at it at your leisure. The purpose literally is to provide opportunity. We are not like an SB, SBR, or MBE where there’s a requirement with a contract. What we do ask however though is if there’s an opportunity for a position that comes up that we get first crack at it. We ask that it comes through the hiring agreement email account and you get five business days in which you post it up to individuals throughout the State.

If they have qualifications for the position, if they apply for the position and follow your normal interview process. If they don’t meet the qualifications, no harm, no file. It is what it is. But if they do meet the qualifications we only ask that they have an opportunity to interview and they potentially get hired.

A little bit of a background on this. This is actually a State legislative statute that goes along with this. You can look those up at your leisure.
This is a little bit more about the background, and if you have any additional questions or if you have any questions about the hiring agreement after this meeting you can always email me directly, either through Hiring Agreement or kenneth.jessup@maryland.gov. Oh, and it’s in effect for the duration of the contract and subcontractors are also part of the agreement, as well. That’s pretty much it.

MR. THORSTRATEN: Great. Well, thank you, Kenneth. We’ll now move on to Section 5. This concerns the submission format. Two Part Submission -- offerors shall submit proposals in separate volumes or envelopes. I know this sounds like it is a hard copy, but it is via eMMA. Volume I is the technical proposal; Volume II is the financial proposals.

Proposals delivered by facsimile and email shall not be considered because it needs to be submitted via eMMA. Provide no pricing information in the technical proposal. Provide no pricing information on the media submitted in a technical proposal.

Offerors shall provide their proposals in two
separate envelopes through eMMA, and you can follow the
quick reference guide, the QRG labeled 5-eMMA QRG
Responding to Solicitations (RFP) for double envelope
submissions. Two-Part Double Envelope Submission --
technical proposal consists of the technical proposal
and all supporting material in Microsoft Word format,
Version 2007 or greater; technical proposal in a
searchable Adobe PDF format; a second searchable Adobe
PDF copy of the technical proposal with confidential
and proprietary information redacted.
And the financial proposal consists of the
financial proposal entered into the price form
spreadsheet in eMMA and all supporting material in
searchable Adobe PDF format. A second searchable Adobe
PDF copy of the financial proposal with confidential
and propriety information removed is included.
In addition to the instructions below,
responses in the offeror’s technical proposal shall
reference the organization and numbering of sections in
the RFP. That is, each section of the RFP is something
that you will respond to. They’re not just sentences
that are there that inform you. You need to respond to
them. So, e.g., Section 2.2.1, your responses.

Section 2.2.2, your responses.

All pages of both proposal volumes shall be
consecutively numbered from beginning page 1 to end,
whatever page that is. The RFP describes in detail how
to format the technical proposal in Section 5.3.

Rather than reading all of the instructions at this
time I will mention some highlights. Please ask
questions after Section 6 if you have any.

5.3.2, F4, if the offeror is submitting
proposals for more than one jurisdiction -- this has
already been covered -- shall produce one technical
proposal regardless of the number of jurisdictions
proposed to serve and a separate financial proposal for
each jurisdiction proposed to serve.

If there are variations in service delivery
based on jurisdictional nuances, those variations shall
be described in detail on a separate page for each
jurisdiction so affected and appended to the technical
proposal. Financial proposal must include separate
pricing proposals for each jurisdiction proposed to be served and labeled as such.

References -- I’m just going over this because when you provide references you do need to follow these guidelines and provide the information these guidelines request. At least three references are requested from customers who are capable of documenting the offeror’s ability to provide the goods and services specified in this RFP.

Each reference shall be from a client for whom the offeror has provided services and goods within the past seven years, and shall include the following information -- the name of the client organization; the name, title, telephone number, and email address if available of point of contact of the client organization; and value, type, duration, and description of goods and services provided.

The Department of Human Services reserves the right to request additional references or utilize references not provided by the offeror. Points of contact must be accessible and knowledgeable regarding
the offeror performance.

5.4, Volume II, Financial Proposal -- the financial proposal shall contain all price information in the format specified in Attachment B. The offeror shall complete the financial proposal form only as provided in the financial proposal instructions, and the financial proposal form itself -- do not amend, alter, or leave blank any items on the financial proposal form. Please remember that offerors may submit a proposal for more than one jurisdiction.

Lastly, I’ll talk about Section 6 and after this there will be a chance to ask further questions. Section 6 is the Evaluation Selection Process. Evaluation of proposals will be performed in accordance with COMAR 21.05.03 by a committee established for that purpose and based on the evaluation criteria set forth below.

Technical Proposal Evaluation Criteria -- the criteria to be used to evaluate each technical proposal are listed below in descending order of importance.

Unless stated otherwise, any sub-criteria within each
criterion have equal weight.

Offeror Qualifications and Capabilities

including Proposed Subcontractors -- the following sub-criterion from Section 5.3.2H is given the greatest weight. The State will give special consideration to agencies that received funding under the Economic Opportunity Act of 1964 for low income energy assistance or weatherization services.

Offeror Technical Response to Requirements and Work Plan -- the State prefers the offeror’s technical proposal to illustrate a comprehensive understanding of work requirements and mastery of the subject matter including an explanation of how the work will be performed.

Proposals which include limited responses to work requirements such as “concur” or “will comply” will receive a lower ranking than those proposals that demonstrate an understanding of the work requirements and include plans to meet or exceed them.

Experience and Qualifications of Proposed Staff -- economic benefit to State of Maryland and then
financial proposal evaluation criteria. All proposed
offerors will be ranked from the lowest most
advantageous to the highest least advantageous price
based on the total proposed price within the stated
guidelines set forth in this RFP and as submitted on
Attachment B, the Financial Proposal form.

Selection Procedures -- the contract will be
awarded in accordance with the competitive sealed
proposals method. The CSP method allows for the
conducting of discussions and the revision of proposals
during these discussions. Therefore, the State may
conduct discussions with all offerors that have
submitted proposals that are determined to be
reasonably susceptible of being selected for a contract
award or potentially so.

However, the State reserves the right to make
an award without holding discussions. With or without
discussions, the State may determine the offeror to be
not responsible or the offeror’s proposal to be not
reasonably susceptible of being selected for award at
any time after the initial closing date for receipt of
proposals and prior to contract award.

Selection Process Sequence -- there are no
MBE or VSBE goals to be concerned about at this point.
Technical proposals are evaluated for technical merit
and ranked during this review. Oral presentations and
discussions may be held.

Offerors must confirm in writing any
substantive oral clarifications of or changes in their
technical proposals made in the course of discussions.
Any such written clarifications or changes then become
part of the offeror’s technical proposal. Technical
proposals are given a final review and ranked.

The financial proposal of each qualified
offeror will be evaluated and ranked separately from
the technical evaluation. After review of the
financial proposals of qualified offerors, the
evaluation committee or procurement officer may again
conduct discussions to further evaluate the offeror’s
entire proposal.

When in the best interest of the State, the
Section 6.5.3, Award Determination. Upon completion of the technical proposal and financial proposal evaluations rankings, each offeror will receive an overall ranking. The procurement officer will recommend award of the contract to the responsible offeror that submitted the proposal determined to be the most advantageous to the State. In making this most advantageous proposal determination, technical factors will receive equal weight with financial factors.

Upon receipt of a notification of recommendation for contract award, the apparent awardee shall complete and furnish the documents and attestations as described in Table 1 of Section 7 RFP Attachments and Appendices.

Okay. So this concludes the presentation of the RFP. Are there any questions regarding any section of the RFP? Please type your name and company into the chat so that I may call on you.
Okay. There was a -- since nobody has typed anything in right now, there was someone who reached out to me very briefly this past week in a phone call. I don’t remember their name but they had started to ask a question about the reimbursement of the mileage that’s mentioned on the B1 form. If that person is here, can they go ahead and state that question? I’m sure everybody would be interested.

MS. CUFFEE: Good afternoon. So this is Tonet and Ms. Robinson from the Neighborhood Service Center. We asked about the travel reimbursement. So we wanted to clarify if that is, you know, going to trainings and so forth because that has been in the last two or three RFPs. It was included. So this is different.

MR. THORSTRATEN: Okay. I can actually break out that part of the B1 form. Give me just a moment.

MR. KANG: Hi. This is Sang Kang from DHS. I think you can maybe send that question in writing and we can get back to you on the travel reimbursement.

MS. CUFFEE: Thank you.
MR. THORSTRATEN: Okay. So there are no other questions? So nobody has any questions before I conclude this conference? Okay. Donna Forrest, you raised a hand? You’re muted.

MS. FORREST: I’m sorry. So I had questions about rounds for eMMA. So when you submit the proposal, whenever there is someone who asks a question or whenever you add information we have to resubmit the proposal each time?

MR. THORSTRATEN: That’s partly right. When people submit questions to me they go through an approval process. I try to answer some. The program answers some. We get the OAG to approve our answers, and then we post those. So it is the posting in eMMA that creates the round.

So whenever I post an actual amendment to the RFP, if a date changes or insurance requirements change, that’s an amendment. That will create a new round, and also when I collect questions together and then in bulk post them as a questions and response, that also creates a round in eMMA.
So, yes, all the way up until the due date of
the solicitation you should watch eMMA, and we do try
to stop posting things roughly a week ahead of the
deadline, but that’s only what we try to do. Something
may happen and we’ll have to post something, and eMMA
will always see that as a round and it will always
create a new round into which you must apply your
proposal. That’s just the way eMMA works.

MS. FORREST: So the follow-up question to
that is does that mean that whenever you post something
that that gives us an additional opportunity to alter
our proposal?

MR. THORSTRATEN: That’s true, and in eMMA
you can actually -- since this is all electronic and I
don’t know how to do this, I’m not a vendor, I see it
from a different end as a procurement officer -- you
can withdraw your proposal and then resubmit it. But
that again is like a vendor -- that will be probably --
I’m sure it will be a QRG about that, but again as a
procurement officer I do not see that part of eMMA so I
really can’t answer that question very well.
MS. FORREST: Okay.

MR. THORSTRATEN: There is an eMMA help desk and they are very good at answering questions. You can reach out to them, as well.

MS. FORREST: Okay. And one more question. The proposals from the last time that you issued a request for them, are those proposals public? Available to the public?

MR. THORSTRATEN: Yes. They can be done via public information requests, and also there is certain information from the previous solicitation that is publicly posted by the Board of Public Works and the agendas. So that you can just go to their website and look it up.

MS. FORREST: So, the Board of Public Works?

MR. THORSTRATEN: Yeah.

MS. FORREST: Okay.

MR. THORSTRATEN: But if you want to see the previous RFP -- Rick, do we need to do that through a PIA or is that a different process for releasing that?

MR. GLASSBAND: Yeah. I mean, we need to
know exactly what she’s requesting. If she doesn’t
find it on BPW we would need to see it in writing.

MR. THORSTRATEN: Okay.

MR. GLASSBAND: And it may need to be a PIA
request.

MR. THORSTRATEN: Right. Okay. Thank you.

MS. FORREST: Yeah. I would just be
interested in the proposal that came from the
successful competitor.

MR. THORSTRATEN: Okay. That would need to
be a public information request. You would need to go
ahead and file that and then --

MS. FORREST: Okay.

MR. THORSTRATEN: Yeah.

MS. FORREST: Does that take a long time or
is that something that happens relatively quick?

Because, yeah, we have until the 17th.

MR. THORSTRATEN: Right. It varies. Like
there is no guaranteed time line for that. I would
just say go ahead and file it and I don’t do that.

That’s a separate department.
MS. FORREST: Okay. And that would be on your website, right, where you file that?

MR. THORSTRATEN: If you do a Google search for that it should come right up, and then also when I do the Q&R for this I will include that information.

MS. FORREST: Okay. Thank you. That’s the questions I have.

MR. THORSTRATEN: Sure. Okay. This is -- if there are absolutely no more questions I’ll go ahead and move on, and again, I do encourage you -- only a couple people of done it -- encourage you to put your information into the chat space. That is really, really helpful for me to have.

Okay. So if there is no one else who has a question, thank you all for attending the Pre-Proposal Conference for the administration of the Maryland Energy Assistance Program and the Electronic Universal Service Program RFP. We look forward to receiving your proposals.

Please remember that proposals are due Monday, January 17th, 2022 by 3:00 p.m. local time via

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eMMA. And thank you very much for attending.

(At 2:00 p.m. the conference concluded.)
CERTIFICATE OF NOTARY

I, Carol O’Brocki, Notary Public, before whom the foregoing testimony was taken, do hereby certify that the witness was duly sworn by me; 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 this action, nor financially or otherwise interested in the outcome of the action; and that the testimony was reduced to typewriting by me or under my direction.

This certification is expressly withdrawn upon the disassembly or photocopying of the foregoing transcript, including exhibits, unless disassembly or photocopying is done under the auspices of Hunt Reporting Company, and the signature and original seal is attached thereto.

______________________________
CAROL O’BROCKI, Notary Public
in and for the State of Maryland

My Commission Expires: January 15, 2023