

STATE OF MARYLAND
DEPARTMENT OF HUMAN RESOURCES
PRE-PROPOSAL CONFERENCE
SOLICITATION NUMBER HRDT/LDP/16-001-S

LEADERSHIP DEVELOPMENT PROGRAM

THURSDAY, DECEMBER 3, 2015

Department of Human Resources
311 W. Saratoga Street
Room 104
Baltimore, Maryland 21201

10:02 a.m. - 10:48 a.m.

IN ATTENDANCE:

MICHAEL DORSEY, Training Manager
DANIKA MONTAGUE, Procurement Officer, HRDP/LDP
DANIEL WAIT, Deputy Director of Personnel

DHR PARTICIPANTS:

DEBORAH AUSTIN, Procurement
WAYNE DIXON, Procurement
BERNICE JEFFRIES, Procurement
KRISTIN LEONARD, Procurement
JUANITA MCGILL, Procurement
NNEKA WILLIS-GRAY, Procurement

ALSO PRESENT:

DARBY ASHMORE, Skyline Technology Solutions
THERESA BOYLE, AP Ventures
SHAVOWN BROWN, BluPrint
VINCENT BROWN, Tauheed Burke and Associates
ZEPHIA BRYANT, Bryant Educational Leadership Group
JOHN BUELOW, Skyline Network Engineering
JACQUIN KIRKMAN, Clientele Human Capital Solutions

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FLORENCE LAFRANCE, Pivotal Practices Consulting
SHEILA LEE, Learning Everywhere
MARTHEA LEWIS, Pivotal Practices Consulting
KRISTAL MURRE, Suasion
BERKINA PORTER, Red Seven Consulting Services
TERESITA SAFF, Top Training
TAMEIKA SCOTT, TN Consulting
ADRIENNE SEMIDEY, CCM Solutions
TEAERA STRUM, Amplified Consulting Group
GLORIA THORNWELL, BluPrint

REPORTED BY: CHRIS HOFER, Notary Public

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P R O C E E D I N G S

1
2 MS. MONTAGUE: Okay. Good morning. Can you
3 hear me? All right. So good morning. Welcome to DHR.
4 My name is Danika Montague. I am the Procurement
5 Officer for the HRDP/LDP, which is Leadership
6 Development Program, solicitation.

7 So once again, we'll just go ahead and get
8 started. My name, Danika Montague. Today we will
9 share information with you concerning the request for
10 proposal entitled Leadership Development Program. And
11 the agency control number for this RFP is HRDT/LDP/16-
12 001-S.

13 If you have not already done so, you can sign
14 in, in the back. When you sign in, we just ask that
15 you indicate if your organization is a certified MBE or
16 SDR. And also, if you have a business card, please
17 provide that. And that will satisfy your sign-in
18 process.

19 Please note that today Hunt Reporting is
20 transcribing this conference. When asking any
21 questions, please state your name and the name of your

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1 company. That's just for the record. A transcript
2 will be provided, and it will be on eMaryland
3 Marketplace as well as the DHR website.

4 Again, my name is Danika Montague. I'm the
5 Procurement Officer for this solicitation. And we'll
6 just go around the room and introduce ourselves.

7 MR. WAIT: I'm Dan Wait. I'm Deputy Director
8 of Personnel here at the Department of Human Resources.
9 Our group is responsible for administering the
10 Leadership Development Program.

11 MR. DORSEY: Hi. I'm Michael Dorsey,
12 Training Manager with the Human Resources and
13 Development and Training Unit. And I'll also be
14 serving as the Project Manager for this particular
15 procurement.

16 MS. MONTAGUE: And the State employees,
17 please? Over here.

18 (State employees introduce themselves, but is
19 not transcribed herein, due to low audio volume.)

20 MS. MONTAGUE: Okay. And we can start with
21 (indiscernible).

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1 (Participants introduce themselves, but is
2 not transcribed herein due to low audio volume.)

3 MS. MONTAGUE: All right. Thank you, and
4 welcome again for coming. Now we'll just have some
5 opening remarks from Mr. Michael Dorsey.

6 MR. DORSEY: You doing all right this
7 morning? I'm not convinced of that, but hopefully
8 you'll warm up a little bit.

9 All right. As was mentioned earlier, my name
10 is Mike Dorsey. I'm the Training Manager for our HRDT
11 Training Unit, and I'm also going to serve as a Project
12 Manager for this program.

13 Just a little bit about the Leadership
14 Development Initiative, or LDI as we affectionately
15 call it here, we've had variations of it through the
16 years here at DHR. However, this cycle coming up that
17 you all are here for will be our third session of this
18 particular format.

19 So we're really excited about this. And
20 actually, in a couple of weeks, we will be graduating
21 28 participants, one including myself, because this was

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1 my first year running this program. And so I really
2 got to get a piece of it by being a participant in it.

3 And so what's nice is that going into our
4 third season, we kind of really have an idea of what
5 we're looking for, what we'd like to see, what things
6 work, what things don't work. And so we're really
7 excited to have you all here today.

8 Just a little bit about the program. You're
9 looking at between twenty-five to twenty-eight
10 participants who are staff with Department of Human
11 Resources. Just a little bit about DHR, we are an
12 agency of about 6,500 employees all the way from
13 Garrett County all the way down to Worcester County.
14 So it covers the entire state.

15 And the participants will be ranging from
16 front line to executive level. And there is a
17 application process, a screening process, a vetting
18 process that will be taking place in a few weeks to
19 probably after the holiday we'll get that narrowed
20 down. And then we'll have the participants.

21 Typically we're looking at nine sessions,

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1 range -- beginning in March. You have nine sessions,
2 which include six classroom sessions, two experiential
3 sessions, and one graduation. And at the graduation,
4 typically there is a class -- a group project that is
5 presented. And the big thing about it is you get to
6 present to the secretary of the agency, which is a big
7 deal for many people, because you don't really get to
8 have an opportunity to present to the person who, like,
9 reports to the Governor. So that's pretty encouraging.

10 This session meets typically on third Fridays
11 of each month, and yeah. So those are a lot of the
12 things about -- little things about it. And if you
13 have some other questions about the program -- but
14 we're just excited to have you all here, and look
15 forward to hearing what you present. Thank you so
16 much.

17 MS. MONTAGUE: Thank you, Michael. All
18 right. So what I'm going to do is I'm just going to go
19 ahead and read through some sections in the RFP. So if
20 you want to read along, I will let you know what
21 section I am on.

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1 Just some general information, the Department
2 of Human Resources is seeking to acquire consulting
3 services for the purpose of implementing an agency-wide
4 Leadership Development Program. The anticipated
5 duration of services to be provided under this contract
6 is ten months. The Department intends to make a single
7 award as a result of this RFP.

8 So Section 1.5. For the purposes of this
9 RFP, I, Danika Montague, am the sole point of contact
10 between the state and the vendor community. Please do
11 not contact any other state representatives regarding
12 questions about this RFP. Please direct all inquiries
13 to my attention.

14 Section 1.8, eMaryland Marketplace. In order
15 to receive a contract award, vendors must be registered
16 on eMaryland Marketplace. Each offerer is requested to
17 indicate its eMaryland Marketplace vendor number and
18 the transmittal letter submitted at the time of your
19 proposal submission.

20 Section 1.9. There have been some questions
21 received prior to this conference. However, time will

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1 not permit us to respond to all of them at this time.
2 Responses to all questions will be posted on eMaryland
3 Marketplace and the DHR web site with sufficient time
4 to allow offerers to review them to assist with
5 formulating their proposal submissions.

6 If any questions are asked during this
7 conference or responded to during the conference,
8 please be advised that the responses to these questions
9 will be posted. Should there be any discrepancy
10 between responses given at this conference and written
11 responses provided subsequently, the written responses
12 shall prevail.

13 Proposal due date and time. And this one is
14 really important, so an unbound original and four
15 copies of both the technical and financial proposals
16 must be received by the procurement officer no later
17 than 3:00 p.m. local time on Monday, December 28, 2015.
18 Again, that is Monday, December 28, 2015, by 3:00 p.m.
19 And that is in order to be considered.

20 Requests for extensions of the due date and
21 time will not be granted. Proposals received after the

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1 due date and time cannot and will not be accepted,
2 except as provided under provisions of COMAR
3 21.05.03.02F and 21.05.02.10.

4 If you are mailing your proposal, please
5 allow sufficient time for mailing to ensure that it is
6 received by myself prior to the proposal due date and
7 time. A postmark by the due date and time is not
8 acceptable. It must be received by myself at 3:00 p.m.
9 on Monday, December 28, 2015.

10 More information regarding the proposal
11 format will be covered in Section 4.

12 Section 1.12. Multiple and/or alternate
13 proposals will not be accepted.

14 Section 1.14. An offerer should give
15 specific attention to the clear identification of those
16 portions of its proposal that it considers confidential
17 and/or proprietary commercial information or trade
18 secrets, and provide justification why such material,
19 upon request, should not be disclosed by the state
20 under the Public Information Act.

21 This confidential and/or proprietary

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1 information should be identified by page and section
2 number and placed after the title page and before the
3 table of contents and the technical proposals, if
4 applicable, separately in the financial proposal.

5 Offerers are advised that upon request for
6 this information from a third party the procurement
7 officer is required to make an independent
8 determination whether the information must be
9 disclosed.

10 Section 1.25, attachment B of the RFP, which
11 is the Bid and Proposal Affidavit. This form must be
12 completed, filled out, and submitted with your
13 technical proposal. You only need to submit it with
14 the original of the technical proposal. Copies are not
15 required.

16 Section 1.26, Contract Affidavit. This form
17 is only to be submitted after notification of apparent
18 contract award. Please do not include with your
19 technical proposal.

20 Section 1.28, Verification of Registration
21 and Tax Payment. Before a business entity can do

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1 business in the state, it must be registered with the
2 State Department of Assessments and Taxation. SDAT is
3 located at State Office Building, 301 West Preston
4 Street. That's Room 803, Baltimore, Maryland 21201.
5 The SDAT website is listed in this section of the RFP.

6 It is strongly recommended that any potential
7 offerer complete registration prior to the due date for
8 receipt of proposals, or that you review your
9 registration information to ensure that it is accurate
10 and up-to-date. An offerer's failure to do so may
11 result in an otherwise successful proposal being
12 dropped from consideration of award.

13 Section 1.36, Conflict of Interest Affidavit
14 and Disclosure. Offerers shall complete and sign the
15 Conflict of Interest Affidavit and Disclosure, which is
16 Attachment I, and submit it with their proposal. All
17 offerers are advised that if a contract is awarded as a
18 result of this solicitation, the successful
19 contractor's personnel who perform or control work
20 under the contract and each of the participating
21 subcontractor personnel who perform or control work

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1 under this contract shall be required to complete
2 agreements substantially similar to Attachment I.

3 Section 1.37, Non-Disclose Agreement. All
4 offerers are advised that this solicitation and any
5 resulting contract are subject to the terms of the Non-
6 Disclosure Agreement contained in this solicitation as
7 Attachment J. This agreement must be provided within
8 ten business days' notification of proposed contract
9 award; however, to expedite processing, it is suggested
10 that this document be completed and submitted with the
11 proposal.

12 Section 1.33, Minority Business Enterprise
13 Goal. Although there is no MBE subcontractor goal
14 participation for this procurement, Minority Business
15 Enterprise vendors are encouraged to submit a response
16 to the RFP.

17 Section 1.34, Living Wage Requirement. The
18 living wage law does not apply to this solicitation.

19 Section 1.41, Veteran-Owned Small Business
20 Enterprise goals. Again, although there is no VSB
21 subcontractor participation goal, you are also

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1 encouraged to submit a proposal if you are.

2 Section 2, Offer Minimum Qualifications.

3 Offerers responding to this RFP shall have at least two
4 years instructing and/or mentoring executives or
5 managers in a leadership development program in
6 federal, state, or local governmental agencies, and at
7 least one year of experience designing and implementing
8 leadership development programs for federal, state, or
9 local governmental agencies or offices.

10 As proof of meeting this requirement, the
11 offerer shall provide with this proposal two references
12 addressing the proposed services with this
13 solicitation. References shall be submitted in the
14 format as specified in Section 4.4.2.9 of this RFP.

15 And now, at this time we'll have Mr. Dan Wait
16 come up, and he'll read about the scope of work.

17 MR. WAIT: Good morning. Again, my name's
18 Dan Wait. I'm Deputy Director of Personnel here at the
19 Department of Human Resources, and I'm going to now
20 bore you by reading through about three pages of this
21 document, the scope of work for this proposal.

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1 Starting with Section 3.1, the Background and
2 Purpose. Michael's already touched on some of this,
3 but the Department of Human Resource's Leadership
4 Development Initiative, LDI, is a leadership
5 development and training program launched in March of
6 2014 along with DHR's new DHR-U online training portal.

7 DHR-U was created to promote training,
8 provide educational experiences and offer career
9 advancement opportunities for all of DHR's employees,
10 including opportunities to receive basic, intermediate,
11 and advanced skills in the areas of communication,
12 project management, supervision and other technical
13 competencies.

14 The LDI program focuses on the principles of
15 servant leadership, a philosophy and practice focused
16 on improving the leaders' interpersonal relationships
17 with and their accountability to those whom they lead.
18 DHR employees from across the state of Maryland
19 participate in the program, meeting monthly in
20 locations across the state of Maryland.

21 During the program, participants receive

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1 instruction in the general leadership, management and
2 the principles of servant leadership and
3 leadership-style assessments. In addition to the
4 classroom sessions, the participants attended two team
5 building retreats. All of the sessions and retreats
6 have been held outside of the Department of Human
7 Resources' facilities.

8 The state is issuing this solicitation for
9 the purposes of acquiring consulting services to
10 continue the implementation of the agency-wide LDI
11 leadership and training program. This ten-month
12 program will provide professional development
13 instructions and evaluations for a group of twenty-five
14 to thirty employees who will be selected by senior
15 executives at the Department.

16 The contractor will design, evaluate and
17 serve as an instructor for the program. The program
18 must be focused on servant leadership, finding the next
19 generations of leaders at DHR, and equipping them with
20 the skills necessary to assume leadership roles within
21 the agency.

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1 Section 3.2, State Supplied Services,
2 Equipment, and Supplies.

3 The state shall provide the following
4 services, equipment and supplies.

5 Number one. Meeting rooms for each monthly
6 session, including audio/visual display equipment at
7 locations selected by the state project manager
8 following contractor input regarding suggested
9 locations and desired equipment.

10 Number two. Transportation and travel
11 expenses for state employee participants to attend the
12 nine monthly sessions.

13 Number three. Admission fees for state
14 employee participants to attend an all-day leadership
15 retreat at a facility to be selected by the state
16 program manager with input from the contractor.

17 Number four. Awards and certificates for the
18 graduation ceremony.

19 The state will provide assistance to the
20 contractor in identifying and inviting guest speakers
21 to appear during the sessions on a pro bono basis.

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1 Section 3.3, Scope of Work Requirements.

2 The contractor shall, 3.3.1, develop and
3 teach a leadership development course in servant
4 leadership for twenty-five to thirty participants with
5 varied levels of managerial experience. The curricula
6 must be based on current and relevant leadership
7 literature with differentiated content adaptable to the
8 varied needs of the participants.

9 The course will be conducted through nine
10 monthly eight-hour sessions, scheduled to be held on
11 the third Friday of each month from March through
12 November of 2016 from 8:30 a.m. to 4:30 p.m. The first
13 session will be held on Friday, March the 18th, 2016.
14 The dates for the remaining sessions may be changed
15 upon the mutual agreement of the contractor and the
16 state project manager. The principal instructor for
17 each of the monthly sessions shall be designated as key
18 personnel. See RFP Sections 1.23 and 4.4.2.8.

19 Number 3.3.2. Conduct the monthly sessions
20 using kinesthetic, audio, tactile, and visual learning
21 strategies appropriate for adult learners. The

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1 contractor shall provide a laptop containing the audio
2 and visual files at each monthly session.

3 3.3.3. Dedicate at least one of the monthly
4 sessions to a leadership retreat that includes an
5 experiential adventure that challenges participants to
6 practice facilitative teamwork skills. The leadership
7 retreat must be held no earlier than May 2016 and no
8 later than September 2016.

9 3.3.4. Plan and oversee a graduation
10 ceremony on the last monthly session. A proposal
11 describing the nature of the graduation ceremony must
12 be submitted to the state project manager no later than
13 March 11, 2016, and will be subject to revision as may
14 be requested by the state project manager.

15 3.3.5. Conduct an individual leadership
16 assessment of each participant. The contractor shall
17 meet with each participant for at least one-hour for
18 the assessment either in person or via the Cisco WebEx
19 conference service. The contractor must schedule the
20 assessment directly with each participant and must
21 conduct the leadership assessments between May 1, 2016

1 and September 1, 2016.

2 3.3.6. Produce a detailed syllabus
3 describing the topics and subtopics to be presented at
4 each of the nine monthly sessions. The syllabus shall
5 include significant course work on the following
6 topics.

7 Number one, introduction to the philosophy
8 and practice of servant leadership.

9 Number two, the application of servant
10 leadership to government sector work

11 Number three, the differences between servant
12 leadership and management.

13 And number four, ethics in public service.

14 3.3.6.1. The syllabus shall outline the
15 topics to be covered in each session; describe any
16 assignments for participants to complete outside of the
17 designated class session times; provide citation
18 references for any textbook and/or instructional
19 material to be used in the class; and propose the types
20 of guest speakers who may be invited.

21 3.3.6.2. The final syllabus shall include a
22 detailed proposal for the leadership retreat, including

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1 a schedule of activities, a description of the goals,
2 and the name, location, and costs of the proposed
3 venue.

4 3.3.6.3. A draft syllabus outlining the
5 first four sessions of the course shall be submitted
6 with the technical proposal and must include a
7 narrative description of the topics to be covered and
8 the instructor's pedagogical approach. The draft
9 syllabus shall list tentative topics that may be
10 covered in the remaining sessions, along with tentative
11 suggestions for locations and activities for the
12 leadership retreats.

13 3.3.6.4. The contractor shall submit a full
14 syllabus for review to the state project manager no
15 later than March 4, 2016. The contractor shall
16 incorporate any changes or updates requested by the
17 state project manager into a final syllabus to be
18 distributed to the LDI program participants at the
19 first monthly session.

20 3.3.7. Provide all instructional and
21 training materials to course participants and to the
22 state project manager at each course session. The

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1 contractor shall provide each participant and the state
2 project manager with a copy of any textbooks prior to
3 the first course session.

4 3.3.8. Design, distribute, collect, and
5 analyze two participant evaluation surveys. One survey
6 must be distributed and collected at the fourth monthly
7 course session. The second survey must be distributed
8 and collected at the final monthly course session.

9 The form of the evaluation surveys must be
10 submitted to the state project manager no later than
11 three weeks prior to distribution and must be revised
12 as may be directed by the state project manager. The
13 second survey must include questions evaluating the
14 individual leadership assessments conducted by the
15 contractor.

16 3.3.9. Prepare written, mid-year and final
17 reports on the leadership development training program.
18 The reports shall include written analysis of the
19 participant evaluation surveys and shall report
20 generally on the progress, successes and challenges in
21 the training program. The final report shall include
22 analysis of the leadership retreats and the leadership

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1 assessments.

2 In addition, the final report shall provide
3 recommendations for changes and improvements that could
4 be made to the program in succeeding years. The
5 mid-year report shall be submitted to the state project
6 manager no later than July 15, 2016 and the final
7 report shall be submitted no later than December 30,
8 2016.

9 And finally, 3.3.10. Meet with the LDI
10 Advisory Committee, consisting of key senior DHR
11 officials and employees appointed by the Secretary of
12 DHR, at least once per month to discuss the leadership
13 training program. Contractor shall present its
14 mid-year and final reports to the Advisory Committee.

15 MS. MONTAGUE: All right. So we're going to
16 finish up reading through the RFP. So we're at Section
17 4.

18 Section 4.1 is Two-Part Submission. Offerers
19 shall simultaneously submit proposals in separate
20 volumes, such as Volume I, the technical proposal, and
21 Volume II, the financial proposal.

22 Section 4.2, Proposals. Volume I, Technical

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1 Proposal, and Volume II, Financial Proposals, shall be
2 sealed separately from one another. It is preferred
3 but not required that the name, email address, and
4 telephone number of the offerer be included on the
5 outside of the packaging for each volume.

6 Each volume shall contain an unbound
7 original, so identified as original, and four copies.
8 Unless the resulting package will be too unwieldy, the
9 state's preference is for two sealed volumes to be
10 submitted together in a single package including a
11 label bearing the RFP title and agency control number,
12 name and addresses of the offerer, and closing date and
13 time for receipt of proposals.

14 An electronic version, CD or DVD, of the
15 technical proposal in Microsoft Word format must be
16 enclosed with the original technical proposal. An
17 electronic version, CD or DVD, of the financial
18 proposal in Microsoft Excel format must be enclosed
19 with the original financial proposal.

20 CD or DVDs must be labeled on the outside of
21 the RFP title -- I'm sorry, on the outside with the RFP
22 title and number, name of the offerer, and volume

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1 number. CD or DVDs must be packaged with the original
2 copy of the appropriate proposal, technical or
3 financial.

4 A second electronic version of Volumes I and
5 Volume II in searchable Adobe PDF format shall be
6 submitted on CD or DVD for Public Information Act
7 requests. This copy shall be redacted so that
8 confidential and/or proprietary information has been
9 removed.

10 All pages of both proposal volumes shall be
11 consecutively numbered from beginning page to the end
12 page.

13 Section 4.4, Volume I, Technical Proposal.

14 Please note that no pricing information is to
15 be included in the technical proposal. Pricing
16 information is to be included only in the financial
17 proposal, which will be Volume II.

18 The technical proposal shall include the
19 following documents and information in order to -- I'm
20 sorry, in the order specified. Each section of the
21 technical proposal shall be separated by a tab and
22 labeled as the following.

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1 Title Page and Table of Contents submitted
2 under tab A; Claim of Confidentiality, if applicable,
3 submitted under Tab A1; Transmittal Letter submitted
4 under tab B.

5 The transmittal letter should include the
6 following.

7 Name and address of the offerer;

8 Name, title, email address, and telephone
9 number of primary contact for the offerer;

10 Solicitation title and agency control number
11 that the proposal is in response to;

12 Signature, typed name, and title of an
13 individual authorized to commit the offerer to its
14 proposal;

15 Federal employer identification number of the
16 offerer, or if a single individual, that individual's
17 Social Security number;

18 Offerer's eMaryland Marketplace number;

19 Offerer's MBE certification number;

20 Offerer's SBR certification number;

21 Offerer's VSBE certification number;

22 Acceptance of all state RFP and contract

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1 terms and conditions;

2 If any exceptions are taken, they are to be
3 noted in the executive summary;

4 And lastly, the acknowledgment of all agendas
5 to this RFP.

6 Executive summary should be submitted under
7 tab C. Minimum Qualifications Documentation, if
8 applicable, submit under Tab D. Offerer Technical
9 Response to RFP Requirements and Proposed Work Plan,
10 submit under tab E. Offerer Qualifications and
11 Capabilities, submit under tab F. Experience and
12 Qualifications of Proposed Staff, including proposed
13 Subcontractors, submitted under tab G. References
14 shall be submitted under tab H. List of Current and/or
15 Prior State Contracts, submit under tab I. Financial
16 Capability under tab J. Certificate of Insurance,
17 submit under tab K. Subcontractors should be submitted
18 under tab L. Legal Action Summary, submit under tab M.
19 Economic Benefit Factors, submit under tab N. And
20 Additional Required Technical Submissions, submit under
21 tab O. This is the section where all of the required
22 forms are to be submitted.

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1 Section 4.5, Volume II, Financial Proposal.
2 Under separate sealed cover from the technical proposal
3 and clearly identified in the format identified in
4 Section 4.2, the offerer shall submit an original
5 unbound copy, four copies, and an electronic version in
6 Microsoft Excel of the financial proposal.

7 The financial proposal shall contain all
8 price information in the format specified in Attachment
9 F. The offerer shall complete the financial proposals
10 Form only as provided in the financial proposal
11 instructions and the financial proposal form itself.

12 Section 5, Evaluation -- well, Section 8, but
13 Section 5, Evaluation Committee, Evaluation Criteria,
14 and Selection Procedure.

15 Section 5.1, Evaluation Committee.
16 Evaluation of proposals will be performed in accordance
17 with COMAR 21.05.03 by a committee established for the
18 purpose and based on the evaluation criteria set forth
19 in the RFP.

20 The evaluation committee will review
21 proposals, may participate in offerer oral
22 presentations and discussions, and will provide input

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1 to the procurement officer. The Department reserves
2 the right to utilize the services of individuals
3 outside of the establishment evaluation committee for
4 advice and assistance as deemed appropriate.

5 Section 5.2, Technical Proposal Evaluation
6 Criteria. The criteria to be used to evaluate each
7 technical proposal are listed below in descending order
8 of importance:

9 Offerer's technical response to RFP
10 requirements and work plan; offerer qualifications and
11 capabilities; experience and qualifications of proposed
12 staff, including proposed subcontractors; economic
13 benefit to the state of Maryland.

14 Section 5.3, Financial Proposal Evaluation
15 Criteria. All qualified offerers -- a responsible
16 offerer determined to have submitted an acceptable
17 technical proposal -- will be ranked from the lowest,
18 most advantageous, to the highest, least advantageous,
19 price based on the total proposal price within the
20 stated guidelines set forth in this RFP and as
21 submitted on Attachment F, the financial proposal form.

22 Section 5.5, Selection Procedures. Technical

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1 proposals are evaluated for technical merit and ranked.
2 During this review, oral presentations and discussions
3 may be held.

4 The purpose of such discussions will be to
5 assure a full understanding of the state's requirements
6 and the offerer's ability to perform the services, as
7 well as to facilitate arrival at a contract that is
8 most advantageous to the state. Offerers will be
9 contacted by the state as soon as any discussions are
10 scheduled.

11 Offerers must confirm in writing any
12 substantive oral clarifications of, or changes in,
13 their technical proposal made in the course of
14 discussions. Any such written clarifications or
15 changes then become part of the offerer's technical
16 proposal. Technical proposals are given a final review
17 and ranked.

18 The financial proposal of each qualified
19 offerer will be evaluated and ranked separately from
20 the technical evaluation. When in the best interest of
21 the state, the procurement officer may permit qualified
22 offerers to revise their initial proposals and submit,

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1 in writing, best and final offers. The state may make
2 an award without issuing a request for a best and final
3 offer.

4 Upon completion of the technical proposal and
5 financial proposal evaluations and rankings, each
6 offerer will receive an overall ranking. The
7 procurement officer will recommend award of the
8 contract to the responsible offerer that submitted the
9 proposal determined to be the most advantageous to the
10 State. In making this most advantageous proposal
11 determination, technical factors will receive equal
12 weight with financial factors.

13 All right. That concludes me reading through
14 the RFP. And now we'll open the floor to any
15 questions. We do ask that you do state your name and
16 company before asking your questions. Yes, ma'am?

17 MS. LAFRANCE: My name is Florence LaFrance
18 with Pivotal Practices. I have a question about
19 Paragraph 1.2.7. Oh, I'm sorry. 1.8 -- 1.28.

20 MS. MONTAGUE: Okay.

21 MS. LAFRANCE: Verification of Tax with the
22 Department of -- the State Department of Taxation. We

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1 are -- we actually participate with a PPO who actually
2 takes care of all of our HR and state taxes and stuff
3 like that.

4 MS. MONTAGUE: Okay.

5 MS. LAFRANCE: Basically, we're not
6 officially registered with the state for that.

7 MS. MONTAGUE: Okay.

8 MS. LAFRANCE: Would that disqualify us?

9 MS. MONTAGUE: Yes. You would need to make
10 sure you are registered with the State Department of
11 Taxation before you submit a proposal. You can submit
12 your proposal. However, if there isn't -- the state
13 decides to award contract to you, if you do not have
14 that taxation requirement, then there may -- disqualify
15 you.

16 MS. LAFRANCE: So we can ask them to open it
17 up and then just file for zero balance? Is that
18 sufficient?

19 UNIDENTIFIED SPEAKER: I think maybe we'll
20 just talk afterwards (indiscernible).

21 MS. LAFRANCE: Okay. Thank you very much. I
22 also have a second question.

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1 MS. MONTAGUE: Yes, ma'am.

2 MS. LAFRANCE: Regarding paragraph 2.3.6.2.
3 It mentions a leadership retreat.

4 MS. MONTAGUE: Okay.

5 MS. LAFRANCE: Do we actually disclose that
6 -- the financial for that in the proposal as well, or
7 is that something that's done separately outside of
8 this proposal?

9 MS. MONTAGUE: You're asking about the
10 financials for that?

11 MS. LAFRANCE: Well, yeah.

12 MS. MONTAGUE: Yeah, you wouldn't -- you
13 would just submit your total price in your financial --

14 MS. LAFRANCE: Okay.

15 MS. MONTAGUE: -- proposal.

16 MS. LAFRANCE: Then leadership retreat is
17 covered?

18 MS. MONTAGUE: Do we cover it, or who covers
19 the --

20 MR. WAIT: I'm sorry. The State covers the
21 entry fees for any retreat and covers the cost for the
22 state participants for that. So anything, I guess,

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1 that you would think would be over and above those
2 state-supplied items, I would include that in my
3 proposal.

4 MS. LAFRANCE: Okay. Thank you very much.

5 MS. MONTAGUE: Do you have any other
6 questions?

7 MS. LEWIS: I'm Martha Lewis from Pivotal
8 Practices, and I'm just curious as to who the current
9 incumbent is for this contract?

10 MS. MONTAGUE: The current incumbent is
11 Suasion. Suasion, LLC.

12 MS. LEWIS: And that was for 2015?

13 MS. MONTAGUE: For -- correct.

14 MS. LEWIS: Was that the same contractor for
15 2014 also?

16 MR. WAIT: Yes, it was.

17 MS. LEWIS: So do you plan on competing this
18 particular solicitation every year?

19 MR. WAIT: As of right now, yes, but that's
20 something that there are discussions out there
21 internally that we'll make decisions on going forward.

22 MS. LEWIS: Thank you.

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1 MS. MONTAGUE: Yes, ma'am.

2 MS. LEE: Sheila Stenhouse Lee with Learning
3 Everywhere. Is the current incumbent eligible to
4 compete for this award?

5 MS. MONTAGUE: The RFP goes out. If they
6 wish to submit a proposal, absolutely. Any further --
7 any other questions?

8 UNIDENTIFIED SPEAKER: (Indiscernible)
9 Solutions. Can the subcontractor or a proposed
10 subcontractor meet the class performance requirements,
11 or does -- can only the primary contractor meet that
12 requirement?

13 MS. MONTAGUE: I think they both -- okay, can
14 you repeat your question?

15 UNIDENTIFIED SPEAKER: Does the -- can a
16 subcontractor meet the class performance requirements
17 (indiscernible), or does the contractor have to do it?

18 MR. WAIT: If I remember correctly, the prime
19 facilitator of the class has to meet requirements, but
20 then I don't know if it's specifically addressed --
21 Hubert, you tell me.

22 HUBERT: I'm going to have to take that under

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1 advisement.

2 MS. MONTAGUE: Yes?

3 MS. THORNWELL: Gloria Thornwell, BluPrint
4 LLC. Based on 5.3.3.7, it says, "Provide all
5 instructional and training materials to course
6 participants and to the state project manager at each
7 course session," et cetera. And then it talks about
8 providing each participant with a copy of the
9 textbooks, can you explain (indiscernible)? I guess
10 I'm a little bit confused, because is that a cost that
11 should be included in the financials -- the cost of
12 textbooks?

13 MR. WAIT: Uh-huh. The proposed textbooks
14 from the contractor included in their syllabus proposal
15 would be something that the contractor would be
16 responsible for providing.

17 MS. MONTAGUE: In the back. You had a
18 question? Could you just state your name?

19 MR. BROWN: Vincent Brown with Tauheed Burke
20 and Associates. In 3.8.3, it talks about a financial
21 retreat. Could that be just one day?

22 MS. MONTAGUE: Is the retreat just one day?

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1 MR. WAIT: Yes. It would be the class
2 session for that particular month, yes.

3 MR. BROWN: Oh. In (indiscernible)?

4 MS. MONTAGUE: Yes, that's absolutely
5 possible. Is there any other questions? Yes.

6 MS. BOYLE: Is there -- I'm sorry. Theresa
7 Boyle, AP Ventures. Under 2.1 offer minimum
8 qualifications --

9 MS. MONTAGUE: Okay.

10 MS. BOYLE: Does the prime vendor have to
11 meet those qualifications, or can the subcontractor?

12 MS. MONTAGUE: The prime vendor.

13 MS. BOYLE: Okay.

14 MR. WAIT: I want to give clarification to
15 the question from the gentleman in the back of the
16 room. The retreat question? Okay. So as I was
17 hearing the question, you were asking me, can the
18 retreat be multiple days, as in, you know, start
19 Friday, go through to Sunday -- was the question I was
20 hearing.

21 What I will say is there can be more than one
22 class session that is dedicated to a retreat, but it

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1 would be a one-day retreat for each of those class
2 sessions. Okay?

3 MR. BROWN: Okay. Thank you.

4 MS. MONTAGUE: Are there any other questions?
5 Yes.

6 UNIDENTIFIED SPEAKER: As far as invoicing
7 the state, (indiscernible).

8 MR. WAIT: Yeah, the invoicing is done on a
9 monthly basis. It has to be done after the service is
10 provided. So you could bill for any given class the
11 next month after that class has been provided.

12 UNIDENTIFIED SPEAKER: So it would be about
13 nine invoices?

14 MR. WAIT: Yes. Correct.

15 MS. MONTAGUE: It would be --

16 MR. WAIT: I'm sorry.

17 MS. MONTAGUE: Would it be ten?

18 HUBERT: (Indiscernible). And in the RFP,
19 Section 3.8.2, it indicates that "The Contractor shall
20 invoice the Department for 1/11th of the contract
21 amount for each full month of service provided under
22 the Contract." (Indiscernible) is eleven months.

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1 MS. MONTAGUE: Any other questions? If you
2 think of some questions, you can always email me any
3 questions that you may have. All answers will be
4 submitted to eMaryland Marketplace as well as the DHR
5 web site. Any questions that were asked today and
6 answered today or not answered today will also be
7 published on eMaryland Marketplace as well as the DHR
8 web site.

9 So that will conclude this pre-proposal
10 conference today. Again, submission for proposals will
11 be on Monday, December 28, 2015, no later than 3:00
12 p.m. Thank you so much for coming. Have a great day.

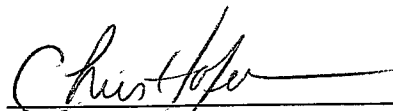
13 (Whereupon, the conference was adjourned.)

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CERTIFICATE OF NOTARY

I, CHRIS HOFER, 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.

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CHRIS HOFER
Notary Public in and for
the State of Maryland

My Commission Expires:

8/1/17

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