STATE OF MARYLAND
DEPARTMENT OF HUMAN SERVICES
PRE-PROPOSAL CONFERENCE

REQUEST FOR PROPOSALS (RFP)
FOR
CUSTOMER SERVICE CENTER

RFP NO. OS/CSC-22-001-S

TUESDAY, AUGUST 8, 2023
2:30 P.M.
VIA GOOGLE MEET TELECONFERENCE

PRESENT FROM MARYLAND DEPARTMENT OF HUMAN SERVICES:

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ALLISON MCLEARY, Tetra Tech
CAROLINA VILLEGAS, ITnova, LLC
REESE EDWARDS, Capitol Bridge, LLC
SAM MARTIN, SaviLinx
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KIM WHEELER, Intratek Computers, Inc.
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JOHN HELLMAN, Inktel Government BPO Services
RUDRA PRASA, Serigor
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MIKEYLA KIDD, Kidd International, Inc.
KEN NEWCOMER, Central Research, Inc.
JEREMY SUTORIUS, CMD Outsourcing Solutions, Inc.
RUSS CAUSEY, CMD Outsourcing Solutions, Inc.
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REPORTED BY: DEBORAH B. GAUTHIER, Notary Public

P R O C E E D I N G S

MR. KANG: Good afternoon, everyone. Welcome to the pre-proposal conference for the Call Center RFP. My name is Sang Kang, and I'm the procurement officer for this RFP solicitation. Today we'll be presenting information about the RFP, and we'll also be trying to answer any questions that you may have concerning this particular RFP.

Please note that while we are presenting the RFP, Hunt Reporting is transcribing this conference. When asking questions, if you could please state your name and the name of your company for the record. Let's see here, we have a large crowd today, but we are going to start the conference with introductions, if we can. And if you're an MBE or a VSBE company, since there are MBE and VSBE goals for this solicitation, a 25 percent MBE goal and a one percent VSBE goal, if you're an MBE or a VSBE, please state that you are, and, also, if you want to, give a quick description of the type of services that you provide so that everyone will know that information.

While we're doing introductions, if possible, everyone please put your name, company, contact information in the chat, if you can, and that will actually become the attendee list, which will be published later. All right. So I don't know exactly how we're going to do this, but -- go ahead, Aretha.

MS. ECTOR: Hi. I guess I'll be the second person to introduce myself, Aretha Ector. I'm with the Office of the Attorney General, and I will be advising on this particular solicitation. I was just thinking, Sang, with so many people, certainly, the Department could introduce themselves, but, with respect to the companies, maybe one individual from each company could identify themselves. I'm not sure how that's going to work, because there are so many people, but, in any event, like you said, please put your name and your company and whether you are an MBE, SBR, women-owned company definitely in the chat, so we can have that.

MR. KANG: Okay. Let's -- yeah, let's do that. That's a good idea. We'll have one person per company. Let DHS go first. Okay. So --

MR. WAIT: I'll jump in for DHS. Dan Wait, Deputy Secretary for Operations.

MR. SMITH: Hi. Thomas Smith, Department of Human Services, Constituent Services, Office Director.

MR. JESSUP: Kenneth Jessup, Program Manager for the Hiring Agreements Program and Cash -- Office of Cash Programs.

MR. BERRY: Rufus Berry, DHS, CPU

MS. REED: Kanisha Reed, DHS, CPU.

MS. MILLER: Hi, everyone. Chandra Miller, DHS Office of Procurement.

MS. HILLGROVE: Great day. Labelle Hillgrove, Director of Policy Compliance and Customer Services, Family Investment Administration.

MS. MUSE: Good afternoon. Leticia Muse, Director of Contracts and Procurement for Child Support Administration.

MS. CAICEDO: Good afternoon, everyone. I'm Claudia Caicedo, and I work for the Constituent Services Office at DHS.

MS. WILLIS-GRAY: Good afternoon. Nneka

Willis-Gray, Department of Human Services, Procurement.

MR. ARUMUGAM: Good afternoon, everyone. Sorry. I'm Sudhakar -- (indiscernible).

MS. ADAMS: Tishana Adams, DHS, CPU.

MS. GRAVES: Shannon Graves, DHS, CPU.

MR. KANG: All right. Anyone else from DHS?

MR. LUI: Nelson Lui, DHS.

MR. KANG: Okay. I think maybe the companies, if you could just get one representative just to let us know you're here.

MR. HASSAN: Olu Hassan, Korak Healthsource Group. We provide customer service to (indiscernible).

MR. MOORE: Name is Jim Moore with HCH Enterprises. We are an MBE, and we provide public consulting services and contact center services to state and local government.

MS. KREZEL: This is Julie Krezel with Solix, Inc. We have several representatives on the conference.

MR. LACOMB: This is Kevin LaComb with Continuum Global Solutions. We have several representatives on as well.

MS. WILDING: Hi. This is Hope Wilding from Public Consulting Group.

MR. MAIER: Hi. This is Fred -- I'm sorry. Sorry, Hope.

MS. WILDING: Sure. Go right ahead.

MR. MAIER: Fred Maier with DMI, and we have a few of our folks on the call as well. Thank you.

MR. *: My name is Alexander (indiscernible) with CSAA Specialized Services.

MR. MARTIN: Alexandra Martin, Maximus.

MR. LAPORTE: This is Kirk Laporte from Senture, a teleperformance company. We have several representatives on the phone as well.

MS. LUCAS: Barb Lucas with Transworld Systems, Inc., and we have several associates on the line as well.

MR. EVANS: Brian Evans from Abt Associates. We have a couple as well, and we do omnichannel contact center services.

MS. MCLEARY: Allison McLeary with Tetra Tech on the line today.

MS. VILLEGAS: This is Carolina from ITnova. We are a women-owned small business and MBE as well.

MR. EDWARDS: Hi. This is Reese Edwards with Capitol Bridge. I'm here today with a couple of colleagues.

MR. MARTIN: Hi. This is Sam Martin representing SaviLinx. I'm here with a colleague. We are a small women-owned business who specializes in omnichannel contact center services.

MR. BATTEY: Hi. I am Anthony Battey with Intratek Computers. We're a call center specialist in California, and we have several colleagues on the call.

MR. COX: Anthony Cox with McGhee and Associates, women-owned and minority-owned business.

MS. SPRINKLE: Erin Sprinkle with ICF. We have several team members on today.

MS. CHAVATEL: Hi. Marta Chavatel representing Symphony Placements. We're a national staffing solutions company. We're an MBE, DBE, WBE, small women-owned business.

MR. HELLMAN: This is John Hellman with Inktel BPO Services with several colleagues on the call we well. Thank you.

MR. PRASAD: This is Rudra Prasad from Serigor. We are MBE (indiscernible) providing IT solutions all across the United States. Thank you.

MR. KANG: Brian McNiff, I think you had your hand raised.

MR. MCNIFF: Yeah, sorry about that. Brian McNiff from TTEC, and I'm here with Amanda Brown and Krissy Chaney.

MR. O'DONNELL: Hello this is Brendan O'Donnell from Amazon. We are a contact center provider.

MR. BENCOSME: This is Ernesto Bencosme with F.H. Cann and Associates, with Katherine Hoffman. We are a women-owned enterprise.

MS. CHAVIS: Stacy Chavis with Kidd, International. Mikeyla Kidd, CEO, is also on the line. We are a women-owned small MBE. We specialize in staffing, print, and full mailhouse services.

MR. NEWCOMER: Hi. This is Ken Newcomer. I'm with Central Research, Incorporated, CRI, and I have a colleague with me on the line.

MR. SUTORIUS: Jeremy Sutorius with CMD Outsourcing Solutions. We're a small business omnichannel call center in the State of Maryland working with the State of Maryland contracts already and I have a couple of people on the line as well.

MR. KANG: Alexander, you want to introduce yourself? Your hand's raised.

MR. FAKERI: Yes. Alexander Fakeri, MOJO Web Solutions. We're a full-service design and development agency. We're a Service-Disabled Veteran-Owned small business, VSBE certified in the State of Maryland.

MR. KANG: I have some more hands right here. Jeph Mathurin.

MR. MATHURIN: Yes. This is Jeph Mathurin. I'm with Vuterra. We are an MBE, and we specialize in geospatial technology intelligence for the local governments and other companies.

MR. KANG: Sean Bartley. Sean, you have your hand raised.

MR. BARTLEY: Yes. Hello. This is Sean Bartley with Direct Interactions. We have multiple representatives on the call.

MR. KANG: Thank you. Su.

MS. FAN: Yes. Hi. Su Fan with Systems Integration, Inc. We are an MBE that specializes in omnichannel contact center solutions and services, and I've got several colleagues on the call today as well. Thank you.

MR. OATES: And this is Tom Oates with ITCON Services, a small business, and we have multiple members on the call.

MR. KANG: Kennedy Services.

MR. SARANT: Yes. This is Matt Sarant from Kennedy Services. We're a women-owned, and there are several of us on the call as well.

MR. KANG: Mr. Wood.

(No response.)

MR. KANG: Anyone else need to introduce themselves?

MR. WOOD: I apologize. I'm Jim Wood from CAG. We do call center services.

MR. KANG: Thank you. Mr. Day.

MR. DAY: Good afternoon. Brandon Day from Aston Carter Government Solutions. We're a national recruiting and staffing organization.

MR. KANG: Olu.

MR. HASSAN: Good afternoon. My name is Olu Hassan. I'm from Korak Healthsource Group. We're MBE certified, and we specialize in providing support staff in customer service and call center areas, and we are local in Maryland. Thank you.

MR. KANG: All right. Anyone else that didn't introduce themselves?

MS. SATAVILLI: Hi. This is Lakshmi with Abacus Service Corporation. We are a certified WBE and do specialize in office staffing and (indiscernible).

MR. KANG: All right. Thank you. So I think we can begin presenting the RFP. Actually, before that, opening remarks will be made by Thomas Smith, who is Director of Constituent Services here at DHS.

MR. SMITH: Hi. Good afternoon everyone. Thanks for joining the call. This contract or this RFP is to operate a Customer Service Center for the Department of Human Services for the State's Social Service Agency, and we have Local Departments of Social Services and Child Support Offices in each of the 24 jurisdictions in Maryland, and our three major administrations are the Family Investment Administration, Child Support Administration, and the Social Service Administration. In addition to that, we have the Constituent Services Office and the Office of the Inspector General. And today we'll cover the services we would like for the RFP.

MR. KANG: All right. Thank you, Thomas. Now I will present Section 1 of the RFP. We're going to go through all six sections and save the questions until after Section 6. So I'll present Minimum Qualifications here. Tishana, if you can, just follow along. If you could just move to Section 1 of the RFP. It's, like, right after the Table of Contents. So there are no minimum qualifications for this RFP, and I don't think we have to go there right now, but there are preferred qualifications for the RFP. And if you look in Section 3.10 of the RFP, the preferred qualifications are as follows. I'll wait for Tishana to present it. At 3.10, the preferred qualifications are, first, within the last five years, the Offeror has Federal, State, Local and/or corporate experience in implementing and delivering call center services in the USA. Another preferred qualification that we have -- the second preferred qualification is a demonstrated knowledge of human services and benefits programs. So those are the minimum and preferred qualifications for this RFP. Now I'll let Thomas present both the Scope of Work and the Contractor Requirements, Sections and and 3.

MR. SMITH: Okay. So we'll start on Section 2, the Scope of Work. Section 2.1 is the Summary Statement, a little bit of what we covered at the top of the call. Again, we're seeking Customer Service Center services for the Department of Human Services with the State Social Service agency and have offices in all 24 jurisdictions in Maryland, both Social Services and Child Support Offices.

And so, with that, we'll move on to Background. Again, we're the State's Social Service agency. We serve over one million constituents or customers annually. And, again, our three major administrations are Family Investment Administration, Child Support Administration, and the Social Services Administration. And, again, in addition to that, there's the Constituent Services Office and the Office of the Inspector General.

And, again, our goal for this RFP is to provide inbound and outbound communications, including telephone services, mail, e-mail, and, again, this is all outlined in the Background and Goals. Again, we have in excess of 200,000 calls per month, and we do -- our call volume may include Tier 1 and Tier 2 services. And the customer services representatives will have to use our State system, which is Eligibility and Enrollment, which is the Family Investment Administration database system, and the Child Support

Management System, which is the database for the Child Support Administration. Again, all this is covered in Section 2.2 for Background and Goals.

If you scroll down, there is -- you'll see Figure 1, which outlines an illustration of really how the inbound and outbound communications work within our Department. As you can see here, customer or caller, telephone or web, the Customer Service Center, and then through to the appropriate DHS Administration and ultimately local offices. You have a listing again of our systems up here at the top and our DHS programs, all the administrations listed previously at the top of the call.

We have project goals. We want to decrease call wait time and improve customer access to our Department and case information, and reduce the amount of time Local Department staff spends on routine tasks through effective and faster responses to customers. We also are seeking innovative ideas, practices, technologies, and other services aimed at improving our customer service efforts.

If you go down to Section 2.2.2, State Staff and Roles, in addition to Procurement Officer and Contract Monitor, the Contractor will interact with the following State staff. You will have DHS Project Liaisons for each of the Administrations we had mentioned at the top of the call, as well as our Office of Technology and Human Services Office for all IT-related services.

2.2.3 is Other State Responsibilities. We'll provide toll-free access to our IVR, and we'll get into the IVR services and Customer Relations Management services, ACD, that will be provided by DHS and (indiscernible) in the following sections. Again, the State will provide initial training on DHS policies and procedures and major systems, and we will provide all current scripts and approved desk reference guides, and we'll also supply you with initial applications and again we'll have more detailed information or see Responsibilities in 2.2.3.

Moving on to Section 2.3 is Responsibilities and Tasks of the Contractor. Again, this RFP is to implement and manage a Customer Service Center services for our Department, inbound and outbound communications, and that incorporates the Department's IVR and CRM; will provide support for customer inquiries on a varying complexity, including making appropriate referrals if the CSR or the CSC, for whatever reason, is unable to fully resolve inquiries. There's also additional information about handing spikes in call volume and meeting Service Level Agreements, which are charted in the below sections.

Moving on to Section 2.3.2 is our IVRS, Interactive Voice Response System. Again, the following solution technologies, IVR, CRM, ACD will be provided by DHS and MD THINK, and it covers what the Contractor shall be operating within the IVR. They will also have to support the Self Service Options, generate Customer Satisfaction Surveys, provide remote announcements in certain situations. Again, this is all covered in 2.3.2.

Moving on to 2.3.3 is the Customer Relations Management System, the CRM. The Contractor shall train staff on the functions of the DHS CRM, which is a web-based system. They'll use the CRM to record and update basic customer information and track all calls, activities, and operations of the Customer Service Center. Again, the Agency will utilize scripts in the Customer Service Center provided by and approved by DHS programs, and DHS will maintain control of the scripts and/or desk guides for dissemination again.

So moving on to the ACD, Automated Call Distribution System, again, this is call-in solution technology that will be provided by DHS and MD THINK, and this outlines -- the 2.3.4 outlines what the Contractor is responsible for, comply with call routing and queuing; use the ACD to gather and report statistics in real-time, including in-queue statistics and outlines some additional call statistics that need to be provided to DHS; also covers insuring that outbound calls to callers have a call-back feature offered. And, again, this is all covered in 2.3.4, the ACD System.

2.3.5 outlines the Customer Service

Representative and the responsibilities of the Contractor there. Again, they'll need to provide enough staff to always meet requirements, as outlined in this RFP. There is a note that at least ten percent of our CSRs of the Customer Service Center need to be fluent in Spanish. And, gain, it outlines additional Contractor responsibilities for the Customer Service Representatives. Again, they'll need to be in accordance with our Administration's Desk Reference Guides, which will be provided on award; and, again, respond to customers with accuracy, professionalism, and in a courteous manner; and insure efficient and effective Work Order Management and tracking in the CRM System.

So moving on to 2.3.6, it outlines phone and e-mail protocols. And we have there how to interact with customers in those channels. 2.3.7 outlines the postal mail and document fulfillment requirement of the Customer Service Center, including mailing general forms, packets, applications, direct deposit forms, et cetera.

Moving down to 2.3.8, the Staffing Plan that will need to be provided by the Contractor. And "B" in Section 2.3.8 outlines how the Staffing Plan will need to be provided to DHS no later than 15 days after the Notice to Proceed and shall be submitted every six months or as needed, requested by DHS.

2.39 goes over training the Customer Service Center agents, what the Contractor is responsible for, and Section E outlines what the Contractor is responsible for and the timelines and the materials they need to provide for training. Insure that all new hires are equipped with the proper system access prior to day one of new hire training; and training shall be delivered in the most effective methods possible.

Moving on, 2.3.10 outlines operational requirements in order to maintain infrastructure, technology, and administrative support, and, again, outlines Contractor responsibilities, including facility. There is a virtual staffing option, at the discretion of DHS. And then, also, policies and procedures, the policies are outlined for our

Department, as well as on the Desk Reference Guides. That also includes federal and state regulations, customer satisfaction surveys and how those are offered to customers, as well as operational meeting requirements are outlined at the bottom of the section.

2.3.11 outlines the technical operation requirements, as far as Contractor's responsibility of purchasing and maintaining equipment; upgrade hardware and other related systems, as necessary; develop web-based correspondence workflows; complete requests for system changes and update customer's information on State automated websites. Again, this is all outlined in the technical operation requirements. There will be an annual review of standards, processes, logs, and configurations with our Office of Technology for Human Services, which is our IT arm of the Department. And it also covers system troubleshooting.

2.3.12 outlines the annual performance review, which was mentioned above, that includes all services performed by the Customer Service Center that will be evaluated by DHS on an annual basis and in accordance with our Service Level Agreements. 2.3.13 outlines quality assurance and quality control standards, including recording 100 percent of calls that will be available to DHS, as requested; monitor five percent of calls received by CSRs; monitor five percent of all case information updates made by CSRs in the DHS system.

Moving on to 2.3.14, it's the Corrective Action Plans and how those will be outlined by the Contractor, in addition to the SLA credits and Liquidated Damages, where applicable.

2.3.15 outlines Contractor-supplied hardware, software, and materials and what the Contractor is responsible for, for all of those applications. And acquisition and operation of the hardware and software and all upgrades is covered in Section 2.3.15.

2.3.16 is required project policies, guidelines, and methodologies, in accordance with DoIT, and our State of Maryland Information Technology Non-Visual Standards, that's covered in that section. 2.3.17 is Product Requirements, as far as open source software and what they're authorized to furnish for proposed goods. Any Contract award, again, is contingent on the State's agreement during Proposal evaluation. That is Product Requirements covered in 2.3.17.

2.3.18, Maintenance and Support outlines Contractor responsibilities, including user support, help desk services. 2.3.18.1 is the technical support of Maintenance and Support and outlines when those services are expected during normal business hours and the different categories there. 2.3.18.2 is Backup and how the web, application, and database needs to be backed up and the Contractor responsibilities and timelines on when they're able to do that. Perform backups for all systems and data necessary to restore fully operational services; again, insuring the backups are encrypted in accordance with IRF Publication 1075 and FIPS 140-2, and outlines when those backups may occur.

2.4 goes over deliverables. 2.4.1 is deliverable submission and outlines how the Contractor will submit those deliverables to the Department. Minimum deliverable quality is outlined in Section D of Section 2.4.1.  2.4.2 is deliverable acceptance and how that will be accepted by the State.  The Contract Monitor will issue a notice of acceptance or rejection of deliverable by e-mail.  And Section D outlines how to proceed in the event of a rejection.

2.4.3 is minimum deliverable quality that was outlined above, and you have information there as far as what the Contractor is responsible for as far as internal quality-control processes in submitting the deliverable to the State.  2.4.4. is definitions of operational reports and time frames that will be requested by the State in the operation of the Customer Service Center and the data we collect that's on this chart you see here, and it also includes the annual performance report that was mentioned above, the annual performance review, and the very last box is ad hoc reports that the State may request.

2.4.5, again, is acceptance criteria for those services.  Again, all this information is included in the chart as far as the description, the State's acceptance criteria and the due date and frequency of all those outlined. So again that is the chart covered in 2.4.5. Continuing on, we will go down -- it also includes how we expect meeting minutes to be provided, IVR call reports, Customer Service Rep call reports, and the different IVR, CRM, and ACD reports, and on the right-hand side it shows you the frequency of those reports, as needed by the State.

So continuing down to Section 2.5 is optional features or services. 2.5.1 and 2.5.2 outlines those optional features or services. 2.5.1. is the Chatbots and Digital Assistant, and 2.5.2 is extended hours of operation for the Customer Service Center.

Section 2.6 outlines Service Level Agreements and provides definitions for problems and monthly charges, SLA credit calculations, and additional information around that is provided in Attachment B of this RFP.

2.6.2 is SLA requirements outlined in 2.6. So continuing on 2.6.3 is the SLA effective date and outlines that information there. 2.6.4 is the service level reporting, as required by the Department. And then 2.6.5 reviews SLA service credits and how those will be implemented in the event that that occurs.

2.6.6 is root cause analysis, about SLA measurement and SLA credits and conduct -- provide information around root cause analysis -- around issues highlighted -- or identified by the Department or the Contractor themselves.

2.6.7 is a chart around system problem response definition and time frames. In regards to those, you can see you have outlined emergency, high, normal, and low.

2.6.8 is another table that outlines our service level measurements, and, again, you have the requirement, measurement, the Service Level Agreement, and the applicable service level credits on the right-hand side there, including service availability, disaster recovery, notification procedures, system and file restoration outlined in the chart for Section 2.6.8.

Moving on to 2.6.9, this is the performance level measurement table that outlines the performance measures and expectations of the Customer Service Center performancewise to our customers. It includes queue wait times; abandoned calls; hold times; Tier 1 and Tier 2 call handling, which we discussed before; real-time dashboard expectations; call resolution and transfer. And, again, it is outlined in the performance requirement, measurement, Service Level Agreement, and any applicable service credits on the right-hand side.

So moving on -- that was Section 2. Moving into Section 3, 3.1 is Contract Initiation Requirements. It outlines schedule and meeting requirements for award, so that's covered in 3.1, Contract Initiation Requirements.

3.2 outlines end of contract transition, as required by the State, for a period up to six months prior to the end of the Contract date, are outlined there. It also includes support of end of contract transition efforts with technical and project support.

That's outlined in 3.2.4. And 3.2.5 outlines return and maintenance of State data. 3.3 outlines invoicing. 3.3.1 is general invoicing information, as required by the Contractor and expected by the State. And the major highlight there is Contractor invoices need to be accurate at the time of submission. Invoices will contain both fixed price and time and material items and shall be clearly identified.

3.3.2 goes into the invoice schedule and additional information is included in Attachment B. 3.3.3 has time and materials invoicing and the invoicing structure. And 3.3.4 is time sheet reporting for employees and the schedule that that's due to the State from the Contractor and outlines additional information for each employee or resource. 3.3.5 is for -- the contract amount will be deemed not due and payable if -- outlined in "A" thorough "I" there. 3.3.6, travel reimbursement will not be reimbursed by the State under this RFP.

3.4 outlines Liquidated Damages. 3.4.1, MBE Liquidated Damages, in Attachment M those are identified. And 3.4.2 is inapplicable to this RFP. Moving on to 3.5, Disaster Recovery and Data. 3.5.1 goes over redundancy, data backup, and disaster recovery standards for the Contractor and outlined by the State. 3.5.2 is data export and import, and, again, no additional charges to the State as far as data import and export; and perform full or partial import/export of State data within 24 hours of a request.

3.5.3 outlines data ownership and access to that data. And then the provisions are in 3.5.1. to 3.5.3 shall survive expiration or termination of the Contract. That information is included there.

3.6, insurance requirements and expectations from the State to the Contractor, including commercial general liability, errors and omissions/professional liability, crime insurance/employee theft insurance, cybersecurity/data breach insurance, Workers' Compensation, automobile or truck -- or commercial truck insurance.

Moving on to 3.7, security requirements, including employee identification, security clearance and background check requirements, onsite security requirements, IT requirements and expectations to adhere to the State IT security policy and standards, which may be revised and are available online at the DoIT's website using the key word "Security Policy". Contractor shall not connect any of its own equipment to a State LAN or WAN without prior written approval by the State.

So, moving on, 3.7.5 outlines data protection and controls, insuring the Contractor provides a secure environment for all State data and any hardware or software, including but not limited to servers, networks, and data components, and which safeguards need to be in place there. CIS security requirements and guides, Security Technical Implementation Guides are all outlined in Section 3.7.5. Additional information about configuration and updated firewalls to insure network connections, and, again, all adhering to the Department of Information Technology's Security Deposits (sic) -- or Security Policy. Excuse me.

3.7.6 goes over security logs and reports access. 3.7.7 is the Security Plan that needs to be provided by the Contractor, a written security policy no less rigorous than the State and supply -- shall supply a copy of such policy to the State for validation. That's covered in Section 3.7.7.

3.7.8 outlines security incident response procedures, as well as notification procedures to the State and what the Contractor must comply with, with all applicable laws that require notification in the event of unauthorized release of State data. That's all covered in Section 3.7.8.

Moving on to 3.7.9, Data Breach Responsibilities, what the Contractor is responsible for in the event of a data breach, as well as all State notification, and the time frames in which to do that.

3.8 outlines problem escalation procedures and what's expected of the Contractor to provide and maintain a problem escalation procedure for both routine and emergency situations and provide -- Contractor shall provide all contact information to the

State's Contract Monitor for this RFP and outlines establishing the existence of a problem, who needs to be notified, and timelines on that, which is outlined, again, in Section 3.8.

Moving on to 3.9, SOC 2 Type 2 Audit Report requirements and how that needs to be provided to the State is outlined in Section 3.9.

Section 3.10 is experience and personnel expected by the Contractor. 3.10.1 outlines Preferred Offeror experience, and 3.10.2 outlines personnel experience and key positions that are listed here. The chart shows position and specifications. Contractor's Project Executive, Contractor's Project Manager, IT Specialist or Specialists, Data Scientist, DHS CRM Helpdesk Support, Supervisor/Manager, Training Leads, Customer Service Representatives are all outlined in the chart in Section 3.10.

So moving on, 3.10.3, number of personnel to propose by the Contractor. 3.10.4 outlines key personnel identified. And then 3.10.5 is Contractor personnel certification requirements, as well as

3.10.6. 3.10.7 outlines work hours for the staff members in subsections "A" through "F"

Section 3.11 is substitution of personnel. Continuous performance of key personnel is outlined in 3.11.1. 3.11.2 is definitions in regards to substitution of personnel. Extraordinary personal event and incapacitating are outlined in that section.

There's replacement circumstances in 3.11.4. And, again, going back to key personnel replacement and then substitution prior to and within 30 days after Contract execution is outlined in 3.11.5.

Section 3.12 outlines Minority Business Enterprise reports, and there's also additional information included in Section 4.26 as far as -- then Section 3.12 includes Prime Contractor paid/unpaid MBE invoice reports and, if applicable, MBE Prime Contractor reports.

3.13 outlines VSBE or Veteran Small Business Enterprise reports. Again, additional information is located in Section 4.27. And, again, similar to above, information relating to that, VSBE Participation Prime

Contractor paid versus unpaid VSBE invoice reports and Participation Subcontractor paid and unpaid VSBE invoice reports and when they need to be reported to the State.

3.14 goes over Task Orders for special projects within this RFP. It goes over information about Task Order requests and how those will be designated from the State, in the event that those are necessary. Section C outlines Contractor requirements as far as response times and details that need to be included for Task Orders that may be deemed necessary by the State.

Section 3.15 is additional clauses and goes over what the Contractor shall be subject to requirements in this section. For custom software, purchasing and recycling of electronic products, change control and advance notice, and also the State of Maryland's commitment to purchasing environmentally preferred products is outlined in Section 3.15.4. 3.15.5 goes over the no-cost extensions information. And that takes us to the end of Section 2 and 3.

MR. KANG: All right. Thank you, Thomas. So at this point I'm going to present sections 4, 5, and 6, and I'm going to get Chanda Miller to help me out with the MBE section, Rufus will present VSBE, and Kanisha Reed will present the Living Wage, and then Kenneth will present Hiring Agreement.

So I'll go through Section 4 rather quickly. This is -- these are just the Procurement Instructions, Section 4. I think beginning with Section 4.2, eMaryland Marketplace, just one thing to be understood is that all proposals do need to be submitted through eMMA. I just want to emphasize that. And for contract award, you do need to be registered with eMMA. Since it is necessary that you be registered, all Offerors should register with eMMA at this time.

Section 4.3 is Questions. The questions you will have concerning this solicitation, you can ask some of them later today, and some of you already sent some by e-mail. I prefer by e-mail, and we will make it a point to answer all questions. All questions and responses will be published on eMMA and the DHS website. Let's see here, Section 4.4, this is a competitive sealed proposal. Section 4.5, proposals are due September the 8th, 2023 at five p.m. And, as I said before, they're only accepted through the eMaryland Marketplace Advantage eMMA system.

Let's see here. Proposals may be modified or withdrawn before the due date, and proposals will not be opened publicly. Multiple or alternate proposals will not be accepted, so you can only submit one essentially. Proposals should be prepared simply and economically. They should be straightforward and concise.

Okay. I'm at Section 4.8 now. This is the Public Information Act. I'll talk about this a little bit later, but you should -- there is a place later in the -- in your submission where you can note information in your proposal that is confidential or proprietary knowledge or trade secret.

Section 4.9. A Contract 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 evaluation factors set forth in this RFP. There will be one award for the RFP.

Oral presentations. There may be oral presentations during the evaluation process, and anything that you present at the oral presentation will be considered part of the technical proposal.

Proposals are -- they are good for 180 days, and if you send in a best and final offer, then that 180 days will be extended. Let's see here, Section -- I'm at Section 4.12. If, for any reason, the State needs to amend the RFP, we're going to send out an amendment, and they will be posted to eMMA and also the DHS website.

Section 4.13, Cancellations. We do have the right to cancel this RFP or accept or reject any proposals.

We'll skip down Section 4.15, Protests and Disputes. Any protest or dispute related to this solicitation or contract award is subject to the provisions of COMAR 21.10.

Section 4.17. If you are submitting a proposal for this RFP, you are deemed to have accepted the terms and conditions in this RFP and the Contract, which is Attachment M.

Section 4.18 is the Proposal Affidavit. Please submit a Proposal Affidavit with your Proposal. It is Attachment C. Section 4.19 is the Contract Affidavit that will be sent later upon award.

Section 4.21. You should be registered with SDAT. It is strongly recommended that you register with SDAT, if you have not done so already.

Section 4.22. No false statements in your Proposal. I'm going to skip down to Section 4.25. Just emphasizing some important things from Section 4 here. Please submit all your questions to me directly. And this section -- again, please submit all your Proposals through eMMA and don't e-mail the Proposal to me, but you should submit any questions you have directly to me through e-mail. You shouldn't submit questions to eMMA. Yeah, please don't submit questions through eMMA.

All right. So at this time, Section 4.26, this is the MBE participation goal. Chanda Miller will present this section, and then Rufus will present VSBE.

MS. MILLER: Good afternoon, everybody, again. As Sang has mentioned, I'll be going over the MBE section of the RFP. I'll just wait for it to come back up. If we could just bring that back up for a moment. I do have a PowerPoint that I'd like to go over with you guys just briefly, but just to give an overview of what Section 4.26 states.

MR. KANG: Do you need me to present something, Chanda?

MS. MILLER: Well, I can just go ahead and go through it. I'll just take it through my PowerPoint. Section 4.26 overviews the acknowledgment by the Offeror of the assigned goal. As Sang has mentioned, this particular contract has a 25 percent MBE participation goal assigned. It does not have any subgoals. So with your Proposal you're going to need to submit a form -- a particular form. It is the MBE Utilization and Fair Solicitation Affidavit, which

Attachment D-1A. I'm going to bring up the Power Point, so you guys can see what that looks like. Just one second. And I apologize for the delay. It's coming up shortly.

(Document shared on screen.)

MS. MILLER: Can you guys all see my screen okay?

MR. KANG: Yes.

MS. MILLER: Okay. Thank you. So just to give a brief overview, the Prime Contractor and subcontractor rights and responsibilities, MBE Subcontractors have the same rights as all Primes. They are entitled to receive fair and equal treatment during the procurement process. They may submit written questions to and receive a written response from the State agency, DHS. They may ask DHS how MBE goals and subgoals were set and raise any technical or MBE-related concerns with the Procurement Officer before the submission deadline. Contractors may also add MBE subcontractors, but not at the expense of originally named MBE subcontractors.

Contractors must ask to remove MBEs, but must do so demonstrating good cause to do so. Any additions, removals, or other changes to the original MBE participation commitment must be approved in writing by DHS. The responsibilities of the Contractor are to insure that the MBE forms are complete and accurate, very important, and that is to receive credit for the -- for maintaining or meeting the MBE goal.

You want to use MBE subcontractors that are named on the MBE Solicitation form, comply with monthly MBE reporting requirements, and also insure that MBE subcontractors do so as well. You want to meet all the deliverables on time and keep good records to document your technical and MBE subcontracting performance.

MBE subcontractor's rights. You must provide the subcontractors with enough time to submit a qualified competitive quote; provide the subcontractors with no less than the same information and amount of time to respond as any other potential subcontractor; obtain the subcontractor's authorization to list the MBE subcontractor on a bid or proposal; and notify the

MBE subcontractor before execution of the contract on which the firm has been listed as an MBE subcontractor.

Just some tips, to keep copies of all documents; carefully review all forms and agreements; keep good records; maintain great communication with the subcontractors -- the Prime and subcontractor relationship throughout the life cycle of the contract; deliver goods and/or services as promised; and get advanced written confirmation of requests for additional work.

Some additional subcontractor responsibilities are that subcontractors are entitled to receive prompt payment from the Prime for undisputed work completed successfully; they must be treated fairly and without fear of harassment or intimidation; and must contact the Project Manager, Procurement Officer, or MBE Liaison directly, when appropriate.

So for contracts with MBE goals, such as this one, vendors must always utilize their assigned subcontractors. If the vendor wants to use an unassigned subcontractor to complete a project, again, it must be submitted in writing with the reason why the assigned subcontractor cannot be utilized, and that letter will be reviewed and approved or not approved by the MBE team.  And always, always make sure that the subcontractors are MBE certified first.  MBE Primes can self-perform up to 50 percent of the overall MBE contract goal and also may self-perform up to a hundred percent of any subgoal, which, again, this contract does not have.  This also speaks, again, to self-performing.

And then the MBE forms, which I mentioned at the beginning, in Section 4.26, the MBE Utilization and Fair Solicitation Affidavit and MBE Participation Schedule must be submitted with your Proposal.  If it's not submitted along with the Proposal, then it will be deemed possibly not satisfied for being selected for an award.  And so with the forms that are provided, you're going to use the one that I mentioned.  The D-1A is the one that you submit with your Proposal, and I'll show you what that looks like.

(Document shared on screen.)

MS. MILLER: You would be essentially submitting, with the exception of the instructions, through D-8, so it's part two, the Utilization and Fair Solicitation Affidavit and Participation Schedule; that's what this looks like. And this is where you would acknowledge that you intend to meet the full certified Minority Business Enterprise participation goal or you would certify that you don't think you would be able to, and at that point you would also submit that with your Proposal. That may impact you receiving an award if you certify that you may not be able to meet the goal.

Aside from that, there's additional documentation and there's a monthly report that's due to the Contract Monitor and to the MBE Liaison by the tenth of every month. And then you want to make sure you maintain good contact, again, throughout the life cycle of the contract with the Contract Monitor and the MBE Liaison, especially if any issues arise. And that takes me to the end of my presentation.

MR. KANG: Okay. Thanks, Chanda. At this

time, Rufus could you present the VSBE portion?

MR. BERRY: Absolutely. Just a second. You want to present the RFP, Sang? Is it open or I can present it.

MR. KANG: I can do it. Chanda, can you do it?

MS. MILLER: Yes.

MR. BERRY: So just take us to Section 4.27. Okay. So I'm going to briefly go over the VSBE section of this RFP. Section 4.27.1, Purpose. The Contractor shall structure its procedures for the performance of work required in this Contract to attempt to achieve the VSBE participation goal set forth in this solicitation. VSBE performance must be in accordance with this section, known as Attachment E, as authorized by COMAR 21.11.13. The Contractor agrees to exercise all good faith to carry out the requirements set forth in this section, known as Attachment E.

B. A certified Veteran-Owned Business -- Veteran-Owned Small Business Enterprise must be verified by the State Department of Veteran's Affairs or the United States Department of Veteran's Affairs and registered as a VSBE on the State's eProcurement platform, as well as eMaryland Marketplace. You can find available VSBEs listed on eMaryland Marketplace under the Vendor Search.

4.27, VSBE Goal. As previously mentioned, the VSBE for this -- for the total Contract amount has been established as one percent for this procurement, and you can find that on the Key Information Sheet.

B. By submitting a response to this solicitation, the Offeror agrees that this percentage of the total dollar amount of the Contract will be performed by verified Veteran-Owned Small Business Enterprises.

We'll go down to Section 4.27.3. In accordance with COMAR 21.11.13.05 C(1), this solicitation requires Offerors to -- and I will briefly go over that. I'm not going to go over all of it, but briefly go over it. 1) The Offeror must identify specific work categories within the scope of this procurement appropriate for subcontracting; 2) The

Offeror must also solicit VSBEs before Proposals are due; 3) You must attempt to make personal contact with the VSBEs solicited and document all attempts; 4) You must assist the VSBEs to fulfill or to seek waiver if needed; 5) You must attempt to attend all meetings -- preproposal meetings and any other meetings set forth by the Procurement Officer.

B. The Offeror must include with its Proposal a completed VSBE Utilization Affidavit and a Prime/Subcontractor Participation Schedule, known as Attachment E-1.

I'll go down to C. As set forth in COMAR 21.11.13.05 B(2), when a verified VSBE firm participates on the Contract as a Prime Contractor, a procurement agency may count the distinct, clearly identified portion of the work of the Contract that the VSBE Prime Contractor with its own work force towards meeting up to 100 percent of the VSBE goal.

D. In order to receive credit for self-performance, a VSBE Prime must list its own firm as the VSBE Prime/Subcontractor Participation Schedule on

Attachment E -- on the Schedule here known as Attachment E-1.

E. Within ten business days from notification that it is the apparent awardee, the awardee must provide the following documentation to the Procurement Officer: And there's a list there. The first one is the VSBE Project Participation Statement, here known as Attachment E-1; If the apparent awardee -- 2) If the apparent awardee believes that a full or partial waiver of the overall VSBE goal is necessary, it must submit a full-documented waiver request that complies with COMAR 21.11.13.07; and 3) And that includes also all other documents required by the Procurement Officer. So I would suggest that everyone please go in and read this section. And all these attachments that is listed can be found in Attachment E of the solicitation. Thanks, Sang. I'll hand it off to you.

MR. KANG: Thanks, Rufus. At this time, Kanisha, could you present the Living Wage requirements?

MS. REED: Good afternoon. I will be presenting the Maryland Living Wage las. I will be sharing the information with you regarding Maryland's Living Wage law, which has been in effect since October 1st, 2007. The Maryland Living Wage law requires certain Contractors and subcontractors to pay a minimum wage to its employees working under certain State services. A solicitation for services under a State Contract valued at a hundred thousand or more or 500,000 or more for contractors with ten or less employees may be subject to this law, which is under Title 18 of the State Finance and Procurement Article of the Annotated Code of Maryland.

The current Maryland Living Wage law is $16.60 per hour effective September the 28th, if the State Contract services valued at 50 percent or more of the total value of the contract is performed Tier 1 area. If the State Contract services valued at 50 percent or more of the value of the contract is performed in a Tier 2, then you will pay each covered employee at least 12.11 per hour.

The specific Living Wage rate is determined by whether the majority of the services take place in Tier 1 or Tier 2 areas of the State. The Tier 1 area includes Anne Arundel, Baltimore, Howard, Montgomery and Prince George's County, and Baltimore City. The Tier 2 area includes any country (sic) -- any county in the State not included in the Tier 1 area. If your business has operations in the area with two different wage tiers, the wage you pay is determined by the area in 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 where the majority of the -- of recipients of the services are located.

Additional information regarding Maryland's Living Wage requirements is contained in Attachment F of the RFP, which is entitled Maryland Living Wage Affidavit of Agreement for Service Contracts. Information may also be found on the Maryland Department of Labor website, labor.maryland.gov. The Living Wage rates are subject to any annual adjustment by the Department of Labor. However, your prices under the Contract may not change because of any Living Wage adjustment. Thank you.

MR. KANG: All right. Thanks, Kanisha. I'll begin presenting again Section 4.29. We're at 4.29, Federal Funds attachment. Please complete the Federal Funds attachment and submit with your Proposal. Conflict of Interest Affidavit and Disclosure; please also complete that Affidavit and submit that with your Proposal. The Non-Disclosure Agreement, Section 4.31, if you are awarded the Contract, a Non-Disclosure Agreement will be required. You may also send that in with your Proposal or upon award. There is no HIPAA Associate Agreement required for this procurement. Section 4.33, the Nonvisual Access requirement, this does apply to this procurement. The Bidder or Offeror warrants that the information technology offered under this bid or proposal provides equivalent access for effective use by both visual and nonvisual means; provides for -- provides an individual with disabilities with nonvisual access in a way that is fully and equally accessible to and independently usable by the individual with disabilities. So please read Section 4.33. It does apply to the RFP, and later, as I will show you, it is an evaluation criteria.

Let's move down to Section 4.35, Location of the Performance of Services Disclosure. This also needs to be submitted with the RFP. And I'll have Kenneth Jessup speak about the Hiring Agreement. Kenneth.

MR. JESSUP: Good afternoon, everybody. I know it's after lunch, so I'm not going to try and keep anyone. Give me one second. Sang, can I present for half a second?

MR. KANG: Yes.

MR. JESSUP: Thank you.

MR. KANG: Go ahead.

MR. JESSUP: Thank you very much. Here we go and -- all right. Can everybody see that okay? Has it come up yet?

MR. KANG: It's not presenting just yet.

There it is.

(Whereupon, Mr. Jessup shared document on screen)

MR. JESSUP: Is it up?

MR. KANG: Yes.

MR. JESSUP: Awesome, 'cause I cannot see it on my screen. I'm just, like, checking to see -- okay. In short -- here we go. Thank you. Yes. All right. There we go. This is the Hiring Agreement clause that's, you know, hopefully, going to be added into the Contract.

The purpose of the Hiring Agreement is to offer an opportunity for current and former Family Investment Program participants to have an employment opportunity with State procurments. The authority comes from State statutes that are listed here on the document. If you'd like, you can get a copy of the document after this meeting. The background for the Hiring Agreement basically is to offer an opportunity on an existing State contract for those that are qualified for it. The way this would work is that if there's a contract that's two years or longer, $200,000 or greater, and produces jobs throughout the life of the contract, including subcontractors, that would be something that we'd be looking for, for the Hiring Agreement Program.

The Hiring Agreement is a lot different than what you would see for, like, MBE or VSBE.  There is no requirement.  There is no minimums attached to the Hiring Agreement.  If you decide to post a position during the life of the contract, we ask for first opportunity to apply for it.  We ask for five business days, because I share it with my partners that are Statewide that could apply for the position.  The only thing we require is an interview.  If you interview the person and they are not a good fit, we do not want to cause any problems or issues for the contract or your business.  Beyond that, that's short answer for the Hiring Agreement, but the big purpose of the Hiring Agreement is to help families.  So the individuals that are on my rolls are individuals that are seeking employment and looking for employment, and, as a provider of skills and resources, we're looking to see if we can find some matches for you. That's it. Any questions?

MR. KANG: Although could we keep the questions till the end, if possible? Olu wants to receive a copy of that. It actually is an attachment.

All right. I'm going to keep presenting the RFP. I'll go quickly through this. So this is not an SBR procurement. And we can move to Section 5. Offerors shall submit Proposals in two volumes, Technical and Financial. As I said before, no facsimile or e-mail submissions. Please submit through eMMA. Please provide no pricing information in the Technical Proposal. It shouldn't have any -- they have to be separate. All financial information should be in the Financial Proposal.

This must be received by the due date and time specified in the Key Information Summary Sheet, which is September the 8th I believe. It has to be received in eMMA by five p.m. of the day that it's due, September 8th. There's nothing I can do about -- it's just not possible for me to take Proposals after that time.

There are instructions there for you. There's a quick reference guide on how to submit a Proposal, so please use that. Let's see here, we'll move down to 5.3. I believe it's 5.3.1. This is kind of important. When you prepare your Proposals, you should reference the section that you're responding to. So if you have, like, Section 2.3.1, a good practice is to write out that section and then respond to that section with how you propose to do that work. And I'm going to get this later, but -- yeah, let me -- let me get to that later.

Okay. So Tab A is your Title Page and Table of Contents. Tab A-1 is where you will identify any confidential or proprietary information. Tab C is the Offeror Information Sheet and Transmittal Letter. You are acknowledging all addenda to the RFP there, and you are giving the name of the individual that's authorized to commit the Offeror to its Proposal.

Executive Summary, you're condensing and highlighting the contents of the Technical Proposal here, and you're also identifying any exceptions to the RFP that you have here. Exceptions do not necessarily -- may be taken, but they may result in the Proposal being not reasonably susceptible for award. Tab E, there aren't any minimum qualifications, so we don't have to really respond to Tab E. Tab E is where you are responding to each section of the Scope of Work, which is Section 2. And Contractor Requirements, Section 3, you're responding to each of those sections there in Tab E.

All right. Let's see here. So the Proposed Work Plan, the Offeror is giving a definitive section-by-section description of the proposed plan to meet the requirements for the RFP. The Work Plan shall include the specific methodology, techniques, number of staff to be used by the Offeror in providing the goods and services as outlined in the RFP. So that is -- that is the main part of -- that's your Proposal really. Tab E here is a large part of your Proposal. It's your response to the Scope of Work. And if you just restate the RFP, those Proposals will more than likely be ranked lower than a Proposal that describes exactly how the work will be done. That's what we're looking for. We're looking for that kind of content there.

One section in Section 5.3.2 -- Chanda, if you want to scroll up a little bit -- another section that is important is number four there, The Offeror shall describe your knowledge about call center operations within the human services field. I'm just trying to emphasize that that's important as well to us. The Implementation Schedule, you have to provide -- you have to identify the locations from which you propose to provide services, and there's a list there of some other parts of your Proposal that we're requesting.

Tab F, this is Experience and Qualifications of Proposed Staff. Offeror is providing a general Staffing Plan, and also note that there are key personnel for this Contract, and Thomas went through them before. Section 3.10, the following individuals are considered key personnel. That's the Contractor's

Project Executive, the Contractor's Project Manager, and the Information Technology Specialist. If you scroll down a little bit, you need to include individual resumes for the key personnel and include letters of commitment to work on the project, including letters from any preferred subcontractors.

Keep moving to Tab G. This is your Offeror Qualifications and Capabilities. Offers shall include information on past experience on similar projects. And actually, you see there in bold at the very end of Tab G, Offeror shall provide a list of all clients/customers for whom they have provided similar services. So please provide us with that information.

References. We're requesting three reference letters from customers who are capable of documenting your ability to provide goods and services. Tab I, List of Current or Prior State Contracts. Please provide that list of State Contracts that you have within the last five years. Tab J, Financial Capability. Offeror must include a commonly-accepted method to prove its fiscal integrity; usually, financial statements. Tab K, Certificate of Insurance. Please provide your current certificate of insurance and then upon Contract award you will have to provide a certificate of insurance that meets the requirements of this RFP.

Subcontractors. We need a list of all your subcontractors, including those used to meet the MBE or VSBE goals in Tab L. Tab M is your Legal Action Summary. Tab N is your Economic Benefit Factors, your response to that. Okay. We can keep moving here. So that's your Financial Proposal. I know there are a lot of tabs there. So your Financial Proposal now is Attachment B. I have sent that out with the RFP. Offerors shall complete the Financial Proposal form only as provided in the instructions that we gave you. Do not amend, alter, or leave blank any items on the Financial Proposal form.

Okay. Let's see here. Section 6, this is the Evaluation Process. The evaluation of Proposals will be performed in accordance with COMAR 21.05.03, which is -- which are the rules for Competitive Sealed

Proposals. We will be -- an Evaluation Committee selected here at DHS will evaluate the Proposals, and the Procurement Officer will recommend award.

Let's see here. Section 6.2, these are the Technical Proposal Evaluation Criteria. And just so you know, they are listed in order of importance. So 6.2.1, Offeror's Technical Response to Requirements and Work Plan, that is the highest criteria for our evaluation. After that, it's Experience and Qualifications of Proposed Staff; Offeror Qualifications and Capabilities; Economic Benefit to the State; and then the Satisfaction of the Nonvisual Access Requirements that I mentioned earlier. Financial Proposal Evaluation will be ranked from lowest to highest, based on price.

Let's see here. I am going to skip down to Selection Process Sequence. Please complete your MBE and VSBE forms properly. And if you have questions, you can e-mail me and I will try to help you. It's very important that these documents be completed properly, 'cause you can be deemed not susceptible, 'cause that's one of the first things that we check.

After that, Technical Proposals are evaluated for technical merit. During this review, oral presentations may be held. During this time, also, we will be sending clarification letters to you to clarify any part of your Proposal that are ambiguous or we just have questions that -- about your Proposal. So after we do the technical rankings, then we look at your Financial Proposal and we rank the Financial Proposals separately after that.

When it is in the best interest of the State, we will also ask for Best and Final Offers. And then after we have ranked Technicals and Financials, we will do an overall ranking, and that is based on -- we make our overall ranking based on the Proposal that is deemed most advantageous to the State, and technical factors will receive greater weight than financial factors. So this concludes our presentation of the RFP. I will open the floor to any questions that you may have. Yes, why don't you raise your hand. That would be a good idea. Okay. Brian McNiff, TTEC.

MR. MCNIFF: Yeah. Thank you, Sang. This is Brian Mcniff from TTEC. So a few questions. Could you tell us who the current IVR/ACD provider is? Did you get them?

MR. KANG: The current IVRS/ACD provider?

MR. SMITH: Yeah, the current IVR is provided by the current vendor.

MR. MCNIFF: Yeah. Thomas, would you know -- have the name of the platform?

MR. KANG: Name of the vendor.

MR. SMITH: The vendor's name is ICF International.

MR. MCNIFF: Okay. And then just as a follow-up, is it possible to release current data on the current process -- the current provider, such as the breakout out of the calls between Tier 1 and Tier 2, handle times, Tier 1 and Tier 2 percentage of the staff that currently works from home or virtual? And we'll put all these in writing, but it would be very helpful if there was -- if you had any -- a data set of -- a current dashboard on the current program.

MR. SMITH: Yeah, if you want to submit it in writing. I will say our average handle time and some of the other metrics you mentioned and what our goals are, are outlined in this RFP, but, yeah, if you want to submit that question in writing, we'll review it and get back to you.

MR. MCNIFF: Okay. Thank you.

MR. KANG: Alexander. Sorry.

MR. FAKERI: Yeah, just a brief question. And there is reference to SOC 2. Is there a requirement for your subcontractors to be SOC 2 compliant as well?

MR. KANG: There is a requirement, as far as I know, for the Prime Contractor.

MS. ECTOR: And, Sang, if I may step in. Yeah, it may depend on what subcontractor's role is and whether or not they will have access to our systems or will have the data, so it really depends on what the subcontractor will be doing.

MR. FAKERI: Thank you.

MR. KANG: Hope Wilding.

MS. WILDING: Hi. This is Hope Wilding from Public Consulting Group. I just had a question about if there was any preference to the State to provide most, if not all of these services in person, so physical locations in Maryland, or versus a virtual environment.

MR. SMITH: The RFP gives you the opportunity to present both of those options.

MS. WILDING: Great. Thank you.

MR. KANG: Quoc.

MS. VIET: Yes. Question on 2.3.7-A, Mail general forms, packets, applications, direct deposit forms, cash pay forms, payment summaries, informational brochures and any other forms required by the Customer no later than two business days. To confirm, is that like paper mail or we're talking about e-mailing these type of documents?

MR. SMITH: Both, and for the hard copies, they would need to be placed in the mail within that time frame.

MS. VIET: Okay. And one more question here for -- under 2.3.11, Technical Operational Requirements, one thing was asking for -- we just wanted to clarify -- under C, purchase install, and maintain a dedicated data circuit (minimum of 20 megabytes per second). Okay. So we're looking for, like, a dedicated communication line with the vendor or is it something that we can have a -- I'm sorry. Is it a direct network circuit or can it be an internet connection?

MR. ARUMGAM: Sudhakar. I can take this. It's an internet connection. You don't need dedicated lines.

MS. VIET: Perfect. Thank you very much.

MR. KANG: Jim.

MR. MOORE: Yes. I apologize, Thomas, but maybe I misunderstood Hope's question, but did you say that we have the option of presenting both a virtual and a premise-based solution or -- 'cause I thought I read the RFP and it said you wanted a premise-based solution and there could be some virtual options.

MR. SMITH: Yes. That's outlined in Section

2.3.10.

MR. MOORE: Thank you.

MS. ECTOR: And just for clarification, there still has to be a physical facility.

MR. MOORE: Thank you.

MS. ECTOR: Sang, while you're waiting -- again, this is Aretha Ector again; sorry about that -- I thought I heard Chanda say there was 25 percent MBE goal, and I think the RFP indicates that it's a 15 percent MBE goal. I just want to make sure we're clear and on the same page for that.

MR. KANG: Aretha, I think that is a mistake. It's 25 percent. I think I need to make an amendment. The MBE goal is 25 percent, and the VSBE goal is one percent.

VOICE: There is, Sang, a question in the chat.

MR. KANG: Yeah. Okay. So, Olu, you are asking, "Is it possible to receive a copy of the Hiring Agreement?" It is an attachment in the RFP, and there is a link there, Attachment O.

MR. HASSAN: Thank you.

MR. KANG: You can reach out to me.

MR. HASSAN: Thanks.

MR. KANG: Let me just get one more question from the chat. "Linda Hefner: Please expand on how you want the response section headings titled. The RFP instructions suggest it should be Section 5.3.2.D, Response."

Yeah. So when you -- when you do your Proposal, you're responding to Sections 2 and 3. So I would put like Section 2.2.1 and whatever that is; Background and Purpose, Section 2.2, maybe Background and Purpose, and I would respond to that section. Then I would put like Section 2.2.3, and then respond to that section as well.

Let's see here. I'm not sure -- "Amanda Brown: Is it possible to receive the current CSC new hire training timeline?" Forgive me. I don't know what that is. I think we're going to have to get back to you in writing. Let's see here, "What percentage of the current staff is virtual?" I don't know if we can give out that information, but we will -- I think I'm going to say we'll get back to you in writing on that one. Matt.

MR. BYRNES: Back to what Aretha said about having a requirement to have an onsite location or a brick-and-mortar location, is that only pertaining to the fulfillment part of the scope of work and that does not need to be in Maryland, if I remember correctly, or is there still a requirement for a brick-and-mortar location in Maryland, even if the agents are virtual?

MR. SMITH: Its related to fulfillment and IT infrastructure.

MR. BYRNES: Okay. But that requirement is not -- it's not a requirement to be in Maryland for those items, correct?

MR. KANG: All right. Let's look at that section. Matt, was there a specific section in the RFP that you're looking at?

MR. BYRNES: I don't remember. All I remember is something about the fulfillment center, it's not a requirement to be in Maryland, if I remember correctly.

MS. ECTOR: So, Sang, it's 2.3.7, Postal Mail/Document Fulfillment Requirements.

MR. KANG: Is it 2.3.7.C? Should I share? I'll present.

(Whereupon, Section 2.3.7.C shared on screen.)

MR. KANG: Right here, Matt (indicating)?

MR. BYRNES: Yes, correct, is at an offsite fulfillment center. "Offsite", does this mean it can be outside of Maryland or is that offsite of where the agents would be, but still in Maryland?

MS. ECTOR: I think -- I'm looking for the section on the facility. And, Thomas, you can --

MR. SMITH: I believe it's 2.3.10. Sorry.

MS. ECTOR: Oh, thank you. I'm flipping pages.

MR. KANG: Yeah, we'll definitely have to get back to you in writing on that one.

MR. BYRNES: Yeah, no worries. We can submit it.

MR. KANG: Yeah. Any questions that you do want us to get back to you in writing, please send them to me whenever you have the chance. John.

MR. HIGH: Yeah. This John High at SIGNIA. I just posted my question, but the Department of Transportation site that has the preferred MBE subcontractor list did not have any with the NAICS code for Call Center. Is there another source for potential subcontractor partners?

MR. KANG: I believe one of the categories might be Training.

MS. ECTOR: Staffing is another option. IT may be a component. So you're not necessarily limited in what your subcontracting opportunities may be. It really just depends on the particular entity, but those are definitely some of the subcontracting opportunities, and they should be substantive services. It could be supplies, equipment, things like that.

MR. HIGH: Yeah. Thanks, Aretha. I appreciate it.

MS. ECTOR: Sure.

MR. KANG: Also, by amendment we're going to probably ask the -- add the NAICS codes to the RFP. This RFP was put out -- well, it was designed before the requirement to put the NAICS codes into the RFP, so we'll try to get that out to you. Dan.

MR. BLITZ: Yeah. Hi, Sang. Question about how and where we're supposed to respond to the Nonvisual Access requirement, 4.33. I don't think it was clear. I might have missed it when we were going through RFP.

MR. KANG: Where would you respond to such -- yeah, you only have to respond to Sections 2 and 3. There is this voluntary -- I'm pretty sure I know where this is. It's called a VPAT. So it's right here. So this is your technical response, This is Tab E (indiscernible) -- it says Voluntary Product Accessibility Template -- comprehensive analysis of your conformance to the nonvisual access standards. Okay. Kevin.

MR. LACOMB: Yes, sir. I wanted to know if there's any like major pain points that you're running into, if you're able to tell us, with the current incumbent.

MR. KANG: I don't know if that's something that the Department will answer, but you can put it in writing and we'll get back to you.

MR. LACOMB: Okay. And then one other -- one other quick question. What are the hours of operation? I may have missed it.

MR. SMITH: Monday through Friday, eight a.m. to five p.m., but there's an optional proposal for extended hours.

MR. KANG: Thanks, Thomas.

MS. ECTOR: Just for the question, I mean, if there's something specific that you are interested in -- certainly, during COVID we all had to pivot and shift. Sometimes there could be changes in federal or state regulations that may require the Contractor to make changes or adjustments rather quickly, and so there are a lot of things that not necessarily this Contractor did not do well, but they are -- as a Contractor, you should certainly anticipate some of the unexpected.

MR. LACOMB: Yeah, of course, of course. Understood. Thank you.

MR. KANG: I'm going to keep going through the chat questions here. "200,000 calls per month. Is this number of calls presented to IVR and presented to agents post-IVR?" I think --

MS. ECTOR: Thomas, can you answer that?

MR. SMITH: For that one and the staffing levels, if you could submit it in writing, we'll get back to you please.

MR. KANG: Okay. Great. "Can you confirm if you have a date we can expect response to questions and inquiries?" We're going to get back to you on a rolling basis. I already have several questions to respond to, so you're going to see more than one series of responses from us. Let's see here. Claudia, did you have something?

MS. CAICEDO: Yes. Thank you, Sang. Thank you, everyone. I have a question for the vendors. I would like you to keep in mind to comply with Section

2.3.5. How do you establish and insure fluency in Spanish of ten percent of the Call Center representatives? That's my question. Thank you.

MR. KANG: 2.3.5. Sorry, I couldn't get to that.

MR. SMITH: Yeah, 2.3.5.B, yeah.

MR. KANG: Dan.

MR. BLITZ: Thank you again, Sang. I'm going to ask a sort of condensed question of several questions that we will be submitting. It relates to requirements, SLAs, and such, regarding the State-furnished systems, and we just wanted to get some kind of an understanding of whether the requirements are in the RFP related to those State systems, such as availability and access, if those are truly meant for the RFP when the system are actually going to be furnished by the State and not by the vendor.

MR. KANG: I assume you mean the CRM and IVRS?

MR. BLITZ: Yes.

MR. KANG: Okay. Can you just ask the

questions and we will get back to you. If an amendment is necessary, we'll do that.

MR. BLITZ: Okay. Thank you.

MS. ECTOR: Right, with the understanding that although the Department will maintain or build out the CRM and have the IVRS, it is still the responsibility of the Contractor to respond and to make sure the system is updated timely. So you will see those requirements in the SLAs. Certainly, if the IVR goes down at no fault of the vendor, then you won't be charged a credit and you won't be held at fault for anything like that.

MR. BLITZ: Okay. That's helpful. Thank you so much. Just on an earlier question about the vendor that's providing the IVR, you mentioned the vendor. Is that -- is that the plan -- is that still the plan going forward, that that vendor will continue to provide the IVR, and is the IVR that's in place today the same IVR system that will be in place at the time that this new contract starts?

MR. KANG: The CRM and IVR will be provided by DHS at the time of contract award.

MS. ECTOR: That's very different from our current contract. Now the current contractor provides the IVR and the CRM. Going forward, the State will take over those two responsibilities.

MR. KANG: Matt.

MR. BYRNES: Do you guys envision your vendor's agents accessing the IVR and CRM through VPNs, Citrix?

MR. KANG: Sudhakar.

MR. ARUMGAM: VPNs.

MR. BYRNES: Okay. So we'll have a tunnel -- VPN tunnel to access all your systems in one place?

MR. ARUMGAM: That's right.

MR. BYRNES: Okay. Thank you.

MR. KANG: Okay. I don't see any hands. I'm going to keep going through the chat questions here. John, we got yours. "Alan Randle: According to Section 2.3.11.L.3, what confidential information is going to be stored at the CSC? Isn't the information in the GFE Sales Force?"

MR. SMITH: I think we'd have to -- we'd have to get back to you in writing.

MR. KANG: Yeah, let's do that. Okay. "Olu: Is there any deadline date to submit questions?" There actually is. Let me just try to find it in the RFP real quick. At the very front. We have August the 22nd for the questions due date.

"Who is the incumbent?" It's ICF International. Next question from Doreen is, "What is the current level of staff during the current hours of operation?" I'm not sure --

MR. SMITH: I'm not sure if we can disclose.

MR. KANG: Yeah. I don't know if we can disclose it either, so we will get back to you in writing. "How many Tier 2 agents are there today?"

MR. SMITH: Same answer.

MR. KANG: Same? Okay. How about "Are any remote operations allowed?" And it's stated in the RFP that -- Thomas, you want to take this?

MR. SMITH: Yeah. The RFP gives you the opportunity to propose physical and virtual options.

MR. KANG: I move on to Robert; "What are the software/hardware vendors for IVR and CRM?"

MS. ECTOR: That I don't understand, because that's -- it's going to be DHS.

MR. WICHTENDAHL: Right. DHS is supplying the software, so, you know, what is the IVR system, 'cause I think I'm reading correctly that in the RFP that whoever gets awarded will be continuing the IVR, right? No? Did I misunderstand that? And so -- and then also we have to do the training on the (indiscernible) CRM system and the IVR. So that's why I was curious about the types of software, so we'll know (indiscernible) --

MS. ECTOR: Okay.

MR. SMITH: As far as the training, that'll be provided by the State. I don't know if we're able to -- we may need to answer the other part of your question in writing and review.

MR. WICHTENDAHL: No problem. Thank you.

MR. SMITH: Sudhakar, that is correct; The State will be providing the training on the systems?

MR. ARUMGAM: That's correct.

MR. KANG: Okay. I think we got Claudia's question there. "Alan Randle: According to Section 2.6.9, does number eight require the Contractor to provide a Dashboard outside the the IVRS/ACD provided solution?" Let me enter that section.

MS. ECTOR: What was it; 2.6.9?

MR. KANG: Yeah. It's -- I'm just trying to find it. Okay. Number eight. So this is the Performance Level Measurement Table (Service, Quality, and Efficiency). We're going to number eight, sorry, Call Resolution -- no, Real-time Dashboard.

MS. ECTOR: What was the question again? I think we have IT on board.

MR. KANG: Right. Let's see here. "Does number eight require the Contractor to provide a Dashboard outside the IVRS/ACD provided solution?" If we can -- I think we need to get back to you, unless Sudhakar --

MS. ECTOR: Can answer.

MR. ARUMUGAM: Sorry. I'm unable to actually comprehend what is -- would you be able to (indiscernible) one more time. We don't need any outside reports, at least what I can visualize as of now.

MR. SMITH: It may be helpful to submit that one in writing as well, and we can take a look at it for you.

MR. KANG: Alan, you want to speak?

MR. RANDLE: Yeah. The reason for those questions is it does look like the Contractor's going to be responsible for -- as you heard earlier, the question was maintaining the IVRS system. There was also a statement about maintaining the sales force requiring a sales force administrator. That's the reason for these questions. Is there -- within the RFP it does look like you're asking for the Contractor to support it, but this here actually says that in the Real-time Dashboard that we have to be able to provide 99 percent availability.

MR. ARUMGAM: Okay. Got you. Okay. So we can detail this out and give an elaborated discussion of what these different roles mean, okay, and I think we can go from there.

MR. RANDLE: Thank you.

MR. KANG: Dan.

MR. BLITZ: Yeah. I just want to go back to the training. The response that the State will provide the training, was that in reference to the training materials or the actual conducting the in-class training?

MR. ARUMGAM: This is Sudhakar. Sorry.

MR. SMITH: I was going to say, training related to the systems, and then the materials as far as instructions for agents and how to handle calls, we'll provide you -- again, the State will train you on the systems, and then we'll provide the materials for you to train your agents in how to conduct phone calls.

MR. BLITZ: Thank you.

MR. KANG: All right. I'm going to keep going through these questions. We got three more right now. "Since IVR and ACD and CRM are provided by DHS, do these systems comply with 508 and other mandated requirements?"

MR. ECTOR: They better.

MR. KANG: All right. "Appendix 4. Can you provide AHT for each type of call, you know, CSA/CSO/FIA/OIG/SSA, and the call volumes by day and month?" So I'm going to go to Appendix 4.

MR. SMITH: Yeah. The AHT goals are outlined on the SLA charts.

MR. KANG: The AHT is in the SLA charts?

MR. SMITH: Average handling time, so it's outlined in our SLA charts. That information's available there.

MR. KANG: Okay. I'm going to go back there. 2.6.9, SLA.

MR. SMITH: And then the call volume question, we've provided in excess of 200,000 calls per month. We then detail it by month and year, although there is a historical appendix that may answer some of your questions, Appendix 4.

MR. KANG: Average handling time is where, Thomas?

MR. SMITH: In the SLA chart. It's in the -- it should be in Section 2.6.9

MR. KANG: I think it's here. Okay. Dan, you're raising your hand again?

MS. ECTOR: So for the person, Sang, who put that question in the chat, does that answer your question, just so we know whether we need to follow up or not, but hearing nothing, I guess it does.

MR. KANG: John, are you there, John DuFour?

MR. DUFOUR: Yeah. I'll submit that question in writing.

MR. KANG: Okay. Great.

MR. DUFOUR: Because I don't see where it says what the penalty is. It doesn't say what the average handling time is

MS. ECTOR: So you want the average handle time for existing calls, not what you would be required to meet?

MR. DUFOUR: Yes.

MR. SMITH: We would have to review that information and see if that's able to be released.

MR. KANG: Yeah. I'm not -- so the information that the vendor -- I don't think -- we'll have to figure out if we can release.

Okay. "Will all questions and answers be released to all respondents?" The questions and responses will be posted on eMaryland Marketplace and the DHS website hopefully on the same day, so -- and you should -- like, an amendment will go out on eMaryland Marketplace, and you should get an e-mail about it. All right. Are there any further questions about the RFP?

(No response.)

MR. KANG: Okay. So thank you all for attending the pre-proposal conference for the Call Center RFP. Please remember that Proposals are due on September 8th at five p.m. And thank you all for attending. All right. Have a great day.

(Whereupon, at 4:33 p.m., the pre-proposal conference was concluded.)

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CERTIFICATE OF NOTARY

I, Deborah B. Gauthier, Notary Public, before whom the foregoing pre=proposal conference was held, do hereby certify that said pre-proposal conference is a true record of the proceedings; 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 pre-proposal conference 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.

Deborah B. Gauthier

DEBORAH B. GAUTHIER,
Notary Public in and for the
State of Maryland

My Commission Expires: October 17, 2023