

CATS+ New Master Contractors Kickoff

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Agenda

- Introduction to the Procurement Officer
- Walk thru of Master Contractor Webpage System Login
- Walk thru of CATS+ webpages
- CATS+ TORFP/RFR Process
- FAQ topics
- Q&A



CATS+ General Information

- Statewide contract for agencies to obtain IT services
- Secondary level of competition in 17 Functional Areas
 - Agencies issue and award their own Task Orders
 - Each Master Contractor in a functional area will be invited to offeror for a Task Order in that functional area
 - Each Task Order follows most COMAR rules
- Not a required use contract
 - Agencies can issue other types of contracts for the same services
 - Unless there is a particular need to issue an RFP, the State tries to use the CATS+ contract



CATS+ Expansion Window

- Expansion Window Awards – first group of awards issued at BPW on 1/25
 - 141 new master contractors awarded
 - Master contract expansion awards will continue as paperwork is completed (next batch on 3/8)



CATS+ Benefits

Drastically reduces timeline to solicit and obtain IT services

- RFPs can take up to a year
- Task Order RFPs (TORFP) take as few as 30 days to solicit and award, with an average of 90 days
- Request for Resumes (RFRs) – an even shorter process for getting to specific services very quickly
 - Project Management
 - All other labor categories – for a short period to fill a gap or provide temporary assistance (6 months)



CATS+ Benefits

Increases visibility and accessibility to small and disadvantaged businesses

- The CATS+ contract has an overall MBE subcontracting goal of 20%, which can be fulfilled only by companies certified as MBEs through MDOT
- Small Business Reserve (SBR)- solicitations may be issued for those companies certified as SBRs via eMaryland Marketplace
- A TORFP may have any or all of SBR, MBE, or VSBE goals set.



Master Contractor Webpage Admin

- Master Contractors must keep their company information up to date on the Master Contract Admin system. Notices and open TORFPs/RFRs are sent to this point of contact.
- Maintain information such as: company point of contact, MBE and SBR status
- Only one Master Contractor point of contact will be able to make changes in the Master Contract Admin system
- DoIT will send an email invitation to the TORFP point of contact with a link and password
- Contact ITPO if the invitation to access the Master Contract Admin system has not arrived.



CATS+ Webpages

- Master Contractors can monitor activity in all functional areas by periodically visiting <http://doit.maryland.gov/contracts/Pages/CATSPlusTORFPStatus.aspx>
- Master Contractors may be able to project upcoming agency needs by monitoring expiration dates of existing CATS+ TORFPs and RFRs



CATS+ TORFP Process

1. Agency issues TORFP (Pre-proposals may be set)
2. Master Contractor prepares/submits TO Proposal
3. Agency evaluates TO Technical/Financial Proposal
4. Agency may elect to conduct a BAFO
5. Agency awards TORFP
6. Agency debriefs unsuccessful offerors
7. TO Contractor commences work



TORFP Step 1: Agency Issues TORFP

- The agency e-mails the TORFP to the master contractors in the applicable functional area
 - If the TORFP is SBR-only, only master contractors listed as SBRs on the CATS+ site receive the TORFP
 - Otherwise, all master contractors receive the TORFP
- The TO Procurement is the sole point of contact for the TORFP
- Each TORFP contains a Key Information Summary sheet



TORFP Step 2: Master Contractor Prepares TO Proposal

- Master contractor makes a bid/no-bid decision based on TORFP scope.
 - A Master Contractor Feedback Form is required if a no-bid decision is made. Access the form via the Master Contract Admin system.
- Attend the pre-proposal conference (strongly recommended), when one is held
 - Most TORFPs hold pre-proposal conferences.
 - Master contractors should prepare for the pre-proposal conference:
 - Read the entire TORFP - including attachments
 - Prepare questions
 - Invite potential partners to the pre-proposal conference



TORFP Step 2: Master Contractor Prepares TO Proposal

- At the pre-proposal conference
 - Network with potential MBEs, VSBEs, and SBRs
- After the pre-proposal conference
 - Master contractors should submit any questions in writing to ensure a confirmed response from the agency and drive any amendments needed.
 - TO Procurement officer will furnish a summary and the list of attendees



TORFP Step 2: Master Contractor Prepares TO Proposal

- Master contractor must express concerns over TORFP *in writing* to the *TO Procurement Officer* **prior to the TORFP due date.**
- MBE non-compliance is one of the most common disqualifiers for a master contractor
 - MBE waivers are available but are not common. Perform due diligence to locate subcontractors, documenting your efforts.
 - Filling out MBE paperwork incorrectly can cause an otherwise qualified master contractor to be eliminated from consideration. **Triple check your paperwork! Some MBE errors cannot be fixed through the “cure” process.**



TORFP Step 2: Master Contractor Prepares TO Proposal

- Follow instructions in the TORFP for TO Proposal preparation and structure.
- Labor Category rates may not be higher than those rates you proposed in the response to the CATS+ RFP.



Step 2: Master Contractor Submits TO Proposal

- TORFPs will indicate either paper or electronic submission.
 - Ensure you leave sufficient time for the TO Proposal to arrive. Late TO Proposals will not be considered.
 - Ask for a receipt or other confirmation that the TO Proposal was received in a timely manner.



Step 3: Agency Evaluates TO Technical Proposal

- The TO Procurement Officer will verify that the TO Technical Proposal is sufficient to proceed into technical evaluation:
 - Any minimum qualifications have been met
 - The TO Proposal is complete and follows TO Proposal format instructions
 - No obvious other questions arise that would result in a determination of “not responsive” or “not responsible”
- The evaluation committee begins review of the TO Technical Proposal using the evaluation criteria identified in the TORFP



Step 3: Agency Evaluates TO Technical Proposal

- TO Procurement Officer will
 - Schedule oral presentations
 - Ask for clarifications
- If identified in the TORFP, the TO Procurement Officer may furnish reading room material to help Offerors with proposal preparation
- If identified in the TORFP, the agency may perform a downselect
- Offerors should plan to bring any proposed personnel to the oral presentation and let them participate
- Offerors with a proposal deemed not qualified will be notified via e-mail
- Qualified TO Technical Proposals are ranked according to the criteria identified in the TORFP



Step 3: Agency Evaluates TO Technical Proposal

- Proposed personnel may only be substituted during evaluation and 30 days after award under limited circumstances:
 - Person is a full-time current employee
(subcontractors, temporary staff or 1099 contractors do not count)
 - The circumstances are deemed in the Agency's sole opinion, to be an extraordinary personnel event. See <http://doit.maryland.gov/contracts/Pages/catsplus-substitution.aspx>



Step 3: Agency Evaluates TO Financial Proposal

- Only those TO Technical Proposals considered qualified will progress to financial evaluation
- TO Financial Proposal labor rates will be compared to the CATS+ master contract maximums
- Master contractors may be asked to
 - Attend financial discussions
 - Provide clarifications
 - Submit one or more Best and Final Offers (BAFO)
- TO Financial Proposals will be ranked according to price



Step 5: Agency awards TORFP

- Award will be made based on most advantageous TO Proposal considering both technical and financial submissions
- Offerors not receiving the award will be notified and offered the opportunity for a debriefing
- Agencies may elect to do a BAFO prior to making an award decision



Step 5: Agency awards TORFP

- The Master Contractor winning the award will
 - Complete and sign the Task Order, Non-Disclosure agreements, and other requested paperwork as identified in the TORFP
 - Return to the TO Procurement Officer the completed and signed paperwork/forms as instructed in the TORFP
 - If a third party escrow account is required in the TORFP, the TO Contractor establishes the escrow account
 - Background checks, if required, must be performed on personnel



Step 6: Agency Debriefs Unsuccessful Offerors

- Agencies follow COMAR 21.05.03.06
 - Discussion limited to the unsuccessful offeror's proposal with no specific discussion of a competing offeror's proposal
 - Discussion is factual and consistent with the evaluation of the unsuccessful offeror's proposal
 - Agency provides information on areas in which the unsuccessful offeror's technical proposal was deemed weak or deficient
 - Discussion will not include the thoughts, notes, or rankings of individual members of an evaluation committee, but may include a summary of the TO Procurement Officer's rationale for the selection decision and recommended award.



Step 7: TO Contractor Commences Work

- Work may only commence after the TO Contractor receives all of the following:
 - Fully executed Task Order Agreement
 - Fully executed Non-Disclosure Agreement
 - Signed Purchase Order and/or Notice to Proceed
- Additionally work may not commence if any requirements identified in the TORFP such as background checks or evidence of insurance are not complete.
- Typically the TO Procurement Officer will issue a Notice to Proceed with a start date and schedule a kick-off meeting for the Task Order.



Post-Award Activities

- After award, the TO Contractor is responsible for:
 - Meeting the requirements of the Task Order
 - Submitting invoices as required in the Task Order
 - Completing living wage reporting as required
 - Complying with the MBE, SBR, VSBE goals in the Task Order and completing associated monthly reporting
 - Responding to Task Order auditing requests as required



Step 9: Post-Award Activities

- Do not perform any work not specified in the TORFP scope unless all necessary change order and/or work order paperwork is complete. TO Contractors performing work prior to completion of change paperwork are completing this work at risk of nonpayment.



FAQs

- See a list of questions included with this kickoff meeting

<http://doit.maryland.gov/contracts/Documents/CATSPPlus/2.KickoffQA.pdf>



Direct Feedback to:

Thank you for joining us!

Contract questions or submissions should be sent to
ITPO.DOIT@maryland.gov

