



**DEPARTMENT OF  
INFORMATION TECHNOLOGY**

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**PBX III  
060B1400048**

Master Contractor  
Kick-Off Conference

March 21, 2011



# Agenda

- Introductions:
  - Contract Manager
  - Procurement Officer
- Contract Specifics
- General Instructions
- Master Contractor Administration System
- Do's and Don'ts
- Questions

# Introductions

- Contract Manager
  - Alan Sabol
  - Department of Information Technology
  - 45 Calvert Street, Room 280
  - Annapolis, Maryland 21401
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  - Email: [alan.sabol@doit.state.md.us](mailto:alan.sabol@doit.state.md.us)
- Procurement Officer
  - Edward Bannat
  - Department of Information Technology
  - 45 Calvert Street, Room 445
  - Annapolis, Maryland 21401
  - Phone Number: 410-260-7662
  - Fax Number: 410-974-5615
  - Email: [edward.bannat@doit.state.md.us](mailto:edward.bannat@doit.state.md.us)

DoIT may change the Contract Manager and/or the Procurement Officer at any time by written notice to the Master Contractors.

# Contract Specifics

- Contract Dates
- Warranty
- Forms
- Proposals
- Maintenance
- MBE goals

# Contract Specifics – Contract Dates

## Effective Contract Dates:

1. Initial Contract:

March 23, 2011 – March 31, 2015

2. First Renewal (if invoked):

April 1, 2015 – March 31, 2017

3. Second Renewal (if invoked):

April 1, 2017 – March 31, 2019

## Contract Specifics - Warranty

- The PO Master Contractor will warrant the equipment, operating systems, applications and services for a minimum two (2) year period, or the to the current contract end date, whichever is shorter
- An agency may specify a different period, but it may not extend beyond the current contract end date
- The warranty period will begin upon System Acceptance by Agency
- Unless otherwise specified in the PORFP, the service level for a repair under warranty that is not otherwise on a maintenance contract is Silver

## Contract Specifics – Warranty – cont'd

- The warranty, at a minimum, will cover **at no additional cost to the State**, the following:
  - Defects in workmanship and materials under normal use
  - Parts, service, and transportation required for repair or normal maintenance
  - All cables, inside wires, terminals and all auxiliary (at a minimum to include batteries and rectifiers) equipment supplied by or utilized by the Contractor
  - Replacement or repair of defective equipment, applications and operating systems

# Contract Specifics – Forms

- Electronic Funds Transfer forms must be submitted once by all Master Contractors. A copy can be obtained at:  
[http://compnet.comp.state.md.us/General\\_Accounting\\_Division/Static\\_Files/gadx-10.pdf](http://compnet.comp.state.md.us/General_Accounting_Division/Static_Files/gadx-10.pdf)
- Functional Area 1 – Mercury Affidavit  
<http://doit.maryland.gov/contracts/Pages/PBXIIIMC.aspx>  
(Required with each PORFP Response)  
Functional Area 2 & 3 – MBE Documentation  
(Required with each PORFP Response)
  - Attachment D-1: Certified MBE Utilization and Fair Solicitation
  - Attachment D-2: MBE Participation Schedule
  - Failure to complete and sign these forms will result in the State's rejection of the PO Proposal<http://doit.maryland.gov/contracts/Pages/PBXIIIMBEParticipation.aspx>

# Contract Specific - Proposals

- Be Aware:



- If you provide specifications for a proposal, you are prohibited from bidding on the proposal

# Contract Specific - Proposals – cont'd

- You cannot make substitutions:
  - If a specific item is requested and you do not sell it
  - If a specific item is no longer available, you should notify the PO Procurement Officer ask for an amendment
- For all PORFPs, the Master Contractor MUST submit:
  - MSRP Documentation, from each manufacturer providing any resources to the bid, which must meet one of the three following DoIT Contract Requirements:
    - MSRP documentation printed on Manufacturer Letterhead
    - Confirming email from Manufacturer Rep confirming all MSRP prices on an attached quote are accurate
    - Manufacturer's Webpage screen shot, with website address included and legible on the document

# Contract Specific - Proposals – cont'd

- For all PORFPs, the Master Contractor MUST submit:
  - The required forms including:
    - MBE Forms D-1 and D-2 for Functional Areas 2 & 3. **Failure to submit completed and signed MBE documentation at the time of submission will result in the State's rejection of the PO Proposal**  
<http://doit.maryland.gov/contracts/Pages/PBXIIIMBEParticipation.aspx>
    - Mercury Affidavit  
<http://doit.maryland.gov/contracts/Pages/PBXIIIMC.aspx>
  - Separate Technical and Financial Proposals

# Contract Specific – Proposals - cont'd

- Technical Proposal
  - Must be labeled “PORFP #, PORFP Title, Technical Proposal”
  - Term must not extend beyond the termination date of the existing contract at time proposal is submitted
  - Be organized, concise, unambiguous, and omit non-relevant information
  - Eliminate potential for misinterpretation
  - Conform with all requirements of the PORFP
  - Submit attachments requiring a signature in .pdf format

# Contract Specific – Proposals - cont'd

- Financial Proposal
  - Must be labeled **“PORFP #, PORFP Title, Financial Proposal”**
  - Must include MSRP documentation for all manufacturers included in the proposal
  - Must be inclusive of warranty at no additional cost to the State

# Contract Specifics - Maint

	Bronze Service	Silver Service	Gold Service	Platinum Service
Equipment Maintenance	Excluded	Included		
Software Maintenance	Included			
Preventative Maintenance	Excluded		Included	
Service Desk Capabilities	Email, Chat, and Toll-free phone			
Service Desk Hours	10 hours on State business days only		24 hours per day, 365 days per year	
Average Speed of Answer (ASA)	120 seconds		60 seconds	
90 <sup>th</sup> Percentile Speed of Answer	300 seconds		120 seconds	
First Call Resolution Percentage	40%			
Response Time to Site - Catastrophic	Not Applicable (these services could be supplied on a T&M basis using Functional Area 3 – Time and Material Labor.	4 Hours	2 hours	30 minutes
Response Time to Site – Major		Next Business Day	6 hours	2 hours
Response Time to Site – Minor		Next Business Day		
Mean Time to repair (MTTR)		2 business days	10 hours	4 hours
90 <sup>th</sup> Percentile MTTR		3 business days	24 hours	8 hours
Status Frequency - Catastrophic		4 Hours	1 Hour	1 Hour
Status Frequency – Major		Next Business Day	4 Hour	1 Hour
Status Frequency – Minor		As needed	Daily	Twice per day

## Contract Specifics – MBE Goals

- Functional Area 1 – Hardware, Software and Licenses:  
MBE Goal 0%
- Functional Area 2 – Maintenance Services:  
MBE Goal 25%
- Functional Area 3 – Time and Material Labor:  
MBE Goal 25%

# Purchase Order Request for Proposals Process

- Step 1 – Receipt of the PORFP
- Step 2 - PO Proposal Preparation
- Step 3 - Proposal Formulation
- Step 4 - Proposal Submission
- Step 5 - Evaluation of Technical PO Proposals
- Step 6 – Evaluation of Financial PO Proposals
- Step 7 - Award of the PO Agreement
- Step 8 - Post Award Activities

## Step 1 – Receipt of the PORFP

- The requesting agency emails the PORFP directly to all MCs that meet the manufacturer and functional area requirements, (either all contractors, or only SBR)
- Once the MC receives the PORFP, the PO Procurement Officer becomes the sole point of contact for that PORFP

## Step 2 - PO Proposal Preparation

- Review the PORFP and assess if submitting a proposal suits your business needs
- If not submitting a proposal, the MC must submit the [Procurement Feedback Form](#). This information helps us monitor the quality of the solicitation
- The MC must express concerns, over requirements in the PORFP, to the PO Procurement Officer, prior to the due date for submission of proposals, in order to be considered

## Step 2 - PO Proposal Preparation - cont'd

- We strongly urge all interested MCs to:
  - Read the entire PORFP (including attachments)
  - Formulate questions to ask prior to the proposal due date
  - Form Minority Business Enterprise (MBE) partnerships for services provided in Functional Areas 2 & 3
- Ensure that you have submitted a signed Letter of Authorization for all manufacturers equipment (including peripherals) that you may propose.

## Step 3 - Proposal Formulation

- Submit Separate Technical and Financial Proposals
  - Include all required documentation:
    - MBE Documentation (D1 & D2) – Completed with authorized Signature for Functional Areas 2 & 3 (**Failure will result in the rejection of the PO Proposal**)
    - MSRP Documentation – For each manufacturer that is included in the proposal  
Must meet one of the following three DoIT Contract Requirements:
      - MSRP documentation printed on Manufacturer Letterhead
      - Confirming email from Manufacturer Rep confirming all MSRP prices on an attached quote are accurate
      - Manufacturer's Webpage screen shot, with website address (URL) included and legible on the document
  - Submit using proper file formats:
    - MS Word 2003 for Technical and MS Excel 2003 for Financial
    - Submit any attachments requiring a signature in .pdf format

## Step 3 - Proposal Formulation – cont'd

- Technical Proposal
  - Must be labeled “PORFP #, PORFP Title, Technical Proposal”
  - Must include all required MBE documentation for Functional Areas 2 & 3 (MBE Forms D-1 and D-2). **Failure to submit this documentation completed and signed at the time of submission will result in the State's rejection of the PO Proposal**
  - Must not extend beyond the termination date of the existing contract at time proposal is submitted

## Step 3 - Proposal Formulation – cont'd

- Financial Proposal:
  - Must be labeled “**PORFP #, PORFP Title, Financial Proposal**”
  - Pricing must include all price information associated with performing all of the services required in the PORFP
  - Labor rates cannot be higher than those proposed in the Master Contract
  - Cannot include charges or services that extend beyond the termination date of the existing contract at time the proposal is submitted

## Step 4 - Proposal Submission

- Submit the PO Proposal:
  - As two separate files in the format specified. Default format is MS Word 2003 for Technical, MS Excel 2003 for Financial
    - 10MB file size limitation for email, can submit each proposal in a separate email if necessary
  - Early enough to ensure delivery by the required date and time
    - Failure for the submitted proposal to be received by the specified date and time will result in rejection of the PO Proposal
  - To the address or email specified in the PORFP
  - Ask for a receipt or confirmation that the PO Proposal has been received by the required due date and time

## Step 5 - Evaluation of Technical Proposals

- The PO Procurement Officer will forward only the technical proposals to the evaluation committee. Technical proposals will be evaluated using the evaluation criteria stated in the PORFP. MCs may be asked to:
  - Provide clarifications
  - Give an oral presentation

## Step 5 - Technical Proposals – cont'd

- MCs submitting Technical Proposals deemed not qualified will be notified via email
- Only Financial Proposals of qualified Technical Proposals will be considered
- When the committee has completed the evaluation of those qualified, technical proposals will be ranked (such as one through five), according to the criteria stated in the PORFP

## Step 6 – Evaluation of Financial Proposals

- The PO Procurement Officer will distribute the Financial Proposals to the evaluation committee for only those Technical Proposals found qualified
- Financial Proposals will be ranked according to price

## Step 6 - Financial Proposals - cont'd

- Master Contractors may be asked to:
  - Attend financial discussions
  - Provide clarifications
  - Submit a Best and Final Offer (BAFO)

## Step 7 - Award of the PORFP

- An award will be made to the most advantageous PO Proposal offer, considering technical and financial submissions
- MCs who submitted proposals, but are not receiving the award will be notified of the winning bidder and the price

## Step 8 - Post Award Activities

- After award of the PORFP, the MC is responsible for:
  - Providing the services and personnel agreed to and required by the Purchase Order Agreement
  - Following the required project policies, guidelines and methodologies required in the PORFP
  - Submitting invoices to the PO Manager as required by the PORFP
  - Complying with Contract Management Oversight requirements

## Step 8 - Post Award Activities – cont'd

- Complying with the MBE goal set forth in the Purchase Order Agreement.
- Submitting monthly MBE reports to the PO Manager and PO Procurement Officer, as required by Attachment 2 - MBE Forms, PO Contractor MBE Report Requirements:
  - MBE Form D-5, MBE Participation PO Contractor Paid/Unpaid Invoice Report
  - MBE Form D-6, MBE Participation Subcontractor Paid/Unpaid Invoice Report

<http://doit.maryland.gov/contracts/Pages/PBXIIIMBEParticipation.aspx>

# MC Admin System

- Each Master Contractor is solely responsible for maintaining current and accurate contact information for their company
  - Each new MC's Admin Contact will be sent a username and temporary password
  - Existing MC's should use their current login and password
  - Each MC will have only one individual to update contact information
  - Changes to your MC contact information can be made at any time, "24/7"

## PLEASE DO

- Update the PBX III Master Contractor pages on the web site as needed
  - Expired contact information could result in not receiving PORFPs
  - Submit the electronic Procurement Feedback Form
    - Must be used when you choose not to bid
- Read the entire PORFP, including all attachments
- Be specific and provide details when responding to how you will meet the requirements stated in the PORFP
  - “Will comply” or “Will meet these requirements” can be evaluated as non-responsive

## PLEASE DO

- Communicate only with the PO Procurement Officer during the PORFP process
  - Ask questions prior to submitting PO Proposals
  - Address any Conflicts of Interest prior to and when submitting a PO Proposal
- Have MBE relationships established before submitting a PO Proposal
- Follow required PO Proposal response format
  - Provide separate technical and financial proposals
  - Submit completed MBE Forms D-1 and D-2 with authorized signature along with the PO Proposal for Functional Areas 2 & 3
  - Submit Mercury Affidavit with the PO Proposal For all Functional Areas

## PLEASE DO NOT

- Contact other State personnel concerning a PORFP
- Submit a late PO Proposal
- Submit an alternate PO Proposal
- Submit marketing materials
- Perform any work not specified in the PORFP scope, unless a change order is executed by the PO Procurement Officer first
- Assume anything



# Questions?