

TECHNICAL OPERATIONAL STORAGE AREA NETWORK (SAN) PROFESSIONAL SERVICES TORFP**TORFP # E00B6400071****Comptroller of Maryland (COM)****80 Calvert Street, Room 212****Annapolis, MD 21401****Mary 5, 2016 10:00 AM**

- I. Welcome and Introduction.....Mike Balderson, Procurement Officer
 - a. Attendees affiliated with Comptroller
 - b. Comptroller's Commitment to Success.....Stan Kizior, IT Director
- II. General Procurement Information & Key Dates.....Mike Balderson, Procurement Officer
- III. MBE/VSBE Goal.....Mike Balderson, Procurement Officer
- IV. How To Submit A Proposal.....Mike Balderson, Procurement Officer
- V. How Your Proposal Will Be Evaluated.....Mike Balderson, Procurement Officer
- VI. Scope of Work..... Stan Kizior, IT Director
- VII. Questions and Answers PeriodALL

We will attempt to answer every question, but our responses may be subject to clarification later. Moreover, the responses given verbally today by COM representatives are not binding upon the COM and are for informational purposes only. Questions for which you desire a firm answer should be submitted via email. All such questions will be answered by the COM, time permitting (before proposal due date). The resultant questions and answers (Q&A's) will be distributed, at no charge, via email). Q&A's will also be posted on the DoIT CATS Plus website. Also, should issues be raised which cause the solicitation to be amended, a copy of the addenda/ amendment will be posted on DoIT CATS Plus website.

- I. Closing Remarks..... Mike Balderson, Procurement Officer

Meeting Summary

Meeting Title TECHNICAL OPERATIONAL STORAGE AREA NETWORK (SAN) PROFESSIONAL SERVICES TORFP
E00B6400071 Pre-Proposal Conference

Date/Time 5/05/2016 @ 10:00 AM – 11:00 AM

Location 80 Calvert Street, Annapolis, 21401 - Conference Room 212

Participants	COM Participants	Org	Role
	San Kizior	COM	Director, Information Technology Division
	Carol Lavix	COM	Assistant Director, Information Technology Div.
	Donald (Tim) Sydnor	COM	Director, Distributed Systems Group
	Bernice Jefferies	COM	Procurement Analyst
	Mike Balderson	COM	Procurement Manager
	Master Contractor Participants		See Attachment.

Objective: To engage potential Master Contractors to the TECHNICAL OPERATIONAL STORAGE AREA NETWORK (SAN) PROFESSIONAL SERVICES (TORFP) by providing information and guidance on the TORFP requirements. In addition, the forum provides an opportunity to have a dialogue with the business community regarding the Comptroller's intentions for SAN support.

Resultant Action Items:

- Send questions to mbalderson@comp.md.us by Friday, May 13, 2016 at 2:00 PM Local Time. **(Master Contractor Participants)**
- Publish the Pre-Proposal Conference Summary and Attendee List on DoIT CATS PLUS website and email to participants. **(M. Balderson)**

Agenda & Discussion Summary

1. Welcome – M Balderson/S. Kizior

- a. Mr. Balderson welcomed attendees and thanked them for participating in this Pre-Proposal Conference.
 - i. The COM is sensitive to the consideration that vendors will be making bid/no bid decisions. The COM scheduled both the Pre-Proposal Conference and the deadline to receive questions early to provide the vendor community with as much information as possible to make their bid/no-bid decisions.
 - ii. DoIT CATS PLUS website will have a published summary of the meeting, and will serve as the primary location for procurement information and updates.
 - iii. Mr. Balderson will use the information provided on the sign-in sheet if it is necessary to contact today's attendees.
- b. Mr. Kizior welcomed the attendees and provided background and context for why SAN support is needed. COM is committed to this initiative and thanks the vendor community

for their attendance. Mr. Kizior closed by stating that the COM looks forward to receiving the audience's proposals.

2. General Procurement Information and Key Dates – M. Balderson:

- a. The *TORFP Key Information Summary Sheet* on Page 2 includes key dates, times and points of contact for this procurement.
 - i. The deadline to submit questions is 5/13/2016 at 2:00 PM Local Time.
 - ii. The COM tentatively plans to submit one set of responses to questions no later than 5/17/2016.
 - iii. The Proposal Due Date is 5/20/2016 at 10:00 AM Local Time. Proposals must be received by that date and time due. If delivery of your proposal is late by one (1) minute, COM law/regulations will prevent the COM from accepting it.

3. MBE/VSBE Goals – M. Balderson

- a. This solicitation has a zero (0) % MBE Subcontracting Goal and a zero (0) % VSBE Subcontracting Goal.

4. How to Submit a Proposal – M. Balderson

- a. For Volume I – Technical Proposal, follow Section 4.1 to ensure completeness of your proposal and compliance to format requirements. It is important that the submittals follow the exact order requested to ensure the COM receives a response to all required elements and to facilitate evaluation. For Volume II- Financial Proposal, the Price Sheet (Attachment F) must be completely filled out. Do not enter any asterisks, notes, or conditions on the values entered.
- b. Instructions for the proposal format and submittal begin on TORFP Page 29.
 - i. The COM will not accept email or fax delivery of proposals. Section 4.2.1.4 lists the acceptable delivery options.
 - ii. Delivery must be provided by the due date and time.
 - iii. The Technical and Financial Proposals must be sealed separately, marked and packaged in accordance with the instructions in Section 4.4. Inappropriately marking or packaging the proposal volumes can disrupt evaluation process.

5. How Your Proposal Will Be Evaluated – M. Balderson

- a. **Executive Summary:** Include the name, phone number, and email information for the contact to be used by the COM for follow up purposes. Also keep company profile information toward the beginning of the proposal.
- b. **References:** Think carefully about your references and reach out to them ahead of time to let them know the COM will be calling them. Ensure your reference point of contact is someone who knows the day-to-day performance attributes of your company during the course of your contract. Ensure that your reference points of contact are accessible for the COM's follow up.
- c. The **Evaluation Criteria (TORFP Page 35)** listed in Section 5.2 are presented in descending order of importance. The evaluation process includes several gates.
 - i. **Responsiveness:** The COM will review the proposal for responsiveness (e.g., delivered on time; follows the format; complies with packaging requirements; names MBE and VSBE subcontractors; identifies what part of the goal they will meet; indicates if they are certified Maryland MBE).
 - ii. **Compliance with Minimum Qualifications (TORFP Page 13)**

1. For the Company, compliance is a Pass/Fail judgement. The COM will use reference feedback to ensure that the Offeror's experience is real.
 2. For the Solution, the Offeror will certify/assert the capabilities of your solution.
- iii. **Technical and Financial Proposal Reviews**
1. The COM will review the proposal and do a qualitative analysis of the technical solution. The COM will look for strengths and weaknesses. The Offeror's Technical Proposal will be ranked based on the technical solution. The Offeror with the best technical approach and solution will be ranked most favorably.
 2. Once the technical review is complete, a financial review will be performed. Note that the Financial Proposal will not be opened until this point. Vendors are reminded that no pricing information should be included in the Technical Volume or any oral presentation materials.
 3. The COM may, but does not always, request a best and final offer (BAFO) affecting either or both of the technical and financial reviews. It is important that your initial submission be your best effort.
 4. The Financial Proposal will also be ranked. The lowest price, details included in the Financial Proposal, and total cost of ownership all contribute to the Financial Proposal ranking.
 5. Technical and financial proposal rankings will both be taken into account for the final ranking. The COM will award based on the most advantageous offer. The award may not necessarily be given to the lowest bid. Technical characteristics will heavily influence the outcome, but price will also factor in significantly.
6. **Scope of Work Overview – S. Kizior**
The COM is issuing this CATS+ TORFP to obtain Technical Operational SAN Storage Professional Services in accordance with the scope of work described in this Section 3. The COM is seeking to procure a professional IT services company to augment our staff by providing targeted technical administrative support of our storage systems and SAN. Day-to-day operations will be conducted by COM staff. The desired targeted technical support will be performed remotely and on-site as the situation allows in our Annapolis and Baltimore Data Centers.
- COM intends to award this Task Order to one (1) Master Contractor that can best satisfy the TO requirements.
7. **Questions & Answers (All): Please send your questions in writing so you also have formal answer. Only formal responses should be relied upon for future clarification.**
- a. Attendees were encouraged to submit questions in writing to Mike Balderson so that the COM could respond through a Question and Answer document.
 - b. Questions that were asked during the pre-proposal conference will be paraphrased in the Question and Answer document and published on eMaryland Marketplace.
8. **Wrap Up**

- a. Please remember, the proposal is due no later than 5/20/2016 at 10:00 AM local time. All required documents must be included and signed where indicated.
- b. Email mbalderson@comp.md.us only with your questions. Only written questions will receive an official response.
- c. On behalf of the Comptroller of Maryland thank you for attending today's session.

Attendee and Contact List

Company	Name	Certified MBE	Email Address	RSVP
DK Consulting	Erin Hamilton	No	ehamilton@dkconsult.net	Yes
Systems Maintenance Services	Marty Campbell	Yes	mcampbell@sysmaint.com	Yes
Gantech	Jay Walker	Yes	jwalker@gantechn.net	Yes
DK Consulting	Heath Goisovich	No	hgoisovich@dkconsult.net	Yes
Verizon Business	John Kozlowski	No	John.kozlowski@verizonbusiness.com	Yes
Applied Technology Services	Bob Marchese	Yes	bobm@appliedtechnologyservices.com	Yes
Presidio	James Ewing	No	jawing@presidio.com	Yes
CMT Services, Inc.	Ted Ridley	Yes	Tridley@cmtservicesinc.com	Yes