

MARYLAND STATE RETIREMENT AGENCY

PRE-BID/PROPOSAL CONFERENCE

SOLICITATION NUMBER G20B540007

External Network and Application Security Testing  
TORFP Control #SRA16-07

120 East Baltimore Street  
Baltimore, Maryland 21202

Friday, October 9, 2015

ATTENDANCE:

AGENCY:

Margie J. Gordon, CPPB, Senior Procurement  
Officer

Ira Greenstein, Chief Information Systems Officer

Calvin Kiser, CISO

David Toft, Director of IT Security and Data  
Quality

John Haynes, Procurement Specialist

ATTENDEES:

Steven Zeve, Janus Associates  
Brian Zernhelt, Software Consortium  
Stephen Bradford, Bithgroup Technologies  
James Ewing, Presidio  
Naveed Moeed, Verizon  
John Kozlowski, Verizon  
Chuck Hutzell, Verizon  
Shree Rupakula, Software Consortium  
Arnold Huff, VISIONET  
John Walker, GANTECH  
Richard McClearn, CAEI, Inc.

Reported by: Chris Hofer, Notary Public  
Hunt Reporting Company, Glen Burnie, Maryland

P R O C E E D I N G S

(10:09 a.m.)

MS. GORDON: We'll go ahead and get this started. Welcome to the Maryland State Retirement Agency. My name is Margie Gordon, I am the Senior Procurement Officer in charge of this procurement -- well, in the process of a procure -- this Task Order Request for a Proposal, which we shortened to be a TORFP.

The title of the TORFP is External Network and Application Security Testing. The control number that we used for this is SRA16-07.

Please note to my right we have a court reporter from the Hunt Reporting Company, they will be recording and transcribing this pre-proposal conference. A copy of the transcript will be emailed to all of the offerors.

I'd like to start with the introductions.

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To my left is our panel, they will introduce themselves, and then we'll have you introduce yourselves.

MR. GREENSTEIN: My name is Ira Greenstein, I am the Chief Information Systems Officer, the CIO for the Agency.

MR. KISER: Calvin Kiser, CISO for the Agency.

MR. TOFT: David Toft, Director of IT Security and Data Quality at the Agency.

MS. GORDON: Okay. We'll start with the gentleman far to the left.

MR. MCCLEARN: Richard McClearn,  
(indiscernible) --

MS. GORDON: Okay, I'm going to ask if you all speak clearly and distinctly, so that the gentleman can get your names correctly on the pre-proposal minutes.

MR. MCCLEARN: Richard McClearn, CAEI, Inc., and I'm (indiscernible).

MR. RUPAKULA: (Indiscernible) Rupakula from Software Consortium, Quality Assurance Management.

MR. ZERNHELT: Brian Zernhelt with Software Consortium.

MR. BRADFORD: Stephen Bradford, Bithgroup Technologies, MBE.

MR. EWING: James Ewing, Presidio, Account Manager.

MR. ZEVE: Steven Zeve, that's Z, as in zebra, E, as in Edward, V, as in Victor, E, as in Edward, I'm from Janus Associates. Janus is a woman-owned small business.

MR. HUFF: Arnold Huff, Executive VP from Visionet.

MR. HUTZELL: Chuck Hutzell, I'm a Program Manager with Verizon.

MR. KOZLOWSKI: I'm John Kozlowski, Account Manager with Verizon.

MR. MOEED: Naveed Moeed, Executive Consultant Partner with Verizon.

MR. WALKER: I'm John Walker with GANTECH, I'm the business developer, and we are also a Minority Business Enterprise.

MR. HAYNES: John Haynes, Procurement Specialist, State Retirement Agency.

MS. GORDON: All right. First off we're going to go over is covering the general information and what this TORFP is about, and we are here to obtain a master contractor to analyze and test the resiliency of the Agency's external Internet facing information systems and, two, Web-enabled applications against external threats and attack, in accordance with the scope of work described in Section 3.

In addition, the master contractor selected

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for contract award shall provide the Agency with a written report presenting the details, analysis and findings that support each conclusion and recommended action, and shall provide a briefing of findings and recommendations to select Agency personnel. Both written and oral reports and the contents thereof shall remain confidential and shall not be disclosed to any third party without the written consent of the Task Order Manager, which is David Toft, to my left, far left.

I'm not going to go over everything in the - - what this is about, it's in your Task Order Request for Proposal in Section 2, we'll go over the min quals. And the min quals are basically only those master contractors that fully meet all minimum qualification criteria shall be eligible for TORFP proposal evaluation. The master contractor's proposal and references will be used to verify min quals. Only

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master contractor qualifications may be used to demonstrate meeting company minimum qualifications unless otherwise indicated.

Now, we did allow in the min quals in Section B that we will allow subcontracting in order to meet all or part of the specific qualifications. There is a 30-percent MBE goal.

I distributed key information summary sheets and on those summary sheets will tell you basically the person that you -- the solicitation title, the number, the functional area that this is -- consists of. The questions that are due, which is October 14th at 12:00 noon, closing date is October the 23rd at 2 o'clock. All proposals shall be emailed, please, we would like them by email to my attention.

Now, if there is a problem and say your email breaks down or something, your Internet breaks down and you have to do a hard copy, please contact me

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first, but also realize that you must still have that hard copy in my hands by October 23rd, 2 o'clock, and not at 2 o'clock in a second or 2:01, it will not be accepted.

There will be no extensions for this TORFP.

As I mentioned earlier, David Toft is the Task Order Manager and I am the Task Order Procurement Officer.

The period of performance for this TORFP is going to be 90 days from the Notice to Proceed letter that you get.

It is a fixed-price TORFP, and we will go into scope of work with Mr. Ira Greenstein. Take it away.

MR. GREENSTEIN: Is that the handoff?

MS. GORDON: Yes.

(Laughter.)

MR. GREENSTEIN: Good morning.

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ALL: Good morning.

MR. GREENSTEIN: The scope of work has two components to it, conducting a penetration test on two Internet facing computer environments, this one here and our disaster recovery site in Annapolis, Maryland, and that is co-located at the Annapolis Data Center. We have equipment there, it is secured in the Data Center, and that will be the second site. There are no other sites. The Agency operates basically out of this building.

And then the second component is to do a thorough security assessment of two Internet facing applications. The employer payroll reporting application is on track to be ready in December and right now, as of this morning, it looks like deployment is February 1st. So again, that -- so the timing looks like it will be okay on this.

The second application is a secure document

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reprint features, which would be off of our public Web site. That is on track to be deployed in January. So there is actually a time frame on that, but again the testing, we would prefer that it happen before deployment. If it happens shortly after, then life will go on, but that -- the exposure is -- the risk exposure is, you know, controlled. It's basically to have people be able to reprint documents that have already been mailed to them.

We intend to award the Task Order to one master contractor who proposes a team of resources and a staffing plan that can best satisfy the Task Order requirements, which reminds me, we should probably put ourselves on STUN (phonetic).

Popping ahead to pages 27 and 28 of the document. There are five deliverables involved, first being an integrated product schedule, which is due one week after the Notice to Proceed; second, is the

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external penetration -- network penetration results. We clearly want that electronically and clearly that has to be -- everything in this is confidential. From our perspective, everything is confidential, even the fact that you're doing this engagement for us is something that we consider confidential. Yes, it is part of the public record that there is an award, but we expect to control the dissemination of any information about it. We don't expect to see it, for example, as a marketing pitch on a Web site or as an example that you put on your Web site that's, gee, we did this for the Agency kind of, you know, situation. I have seen that before in other circumstances, that is not something that we would consider acceptable.

The third deliverable is the analysis, conclusions and recommendations based on the external network penetration test.

The fourth deliverable is the Internet

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application test results, that is the application testing results. And then the fifth deliverable is the analysis and conclusions and recommendations based on that.

It's fairly straightforward. Any questions about that? Sir, in the back?

MR. ZEVE: Yes, do you have --

MR. GREENSTEIN: Could you please identify your name and company for the reporter?

MR. ZEVE: Sure, Steven Zeve, Janus Associates.

MR. GREENSTEIN: Yes.

MR. ZEVE: Do you have specific formats with respect to these deliverables to be in?

MR. GREENSTEIN: No, I don't think so. They need to be complete, they need to have all the stuff and, beyond that. I would expect the test results would probably be in electronic format, because

there's probably a considerable volume of the. But beyond that, no.

MR. ZEVE: Okay. Thank you.

MR. GREENSTEIN: You're welcome.

I'm going to jump ahead to proposal evaluation criteria, that is on page 40 of the Task Order RFP. I will note that failure to meet the minimum qualifications shall render a Task Order Proposal not reasonable susceptible for award.

The three criteria for evaluation are the capability of the proposed resources to perform the required tasks. The capability will be determined from each proposed individual's resume, reference checks and the oral presentation. Additional weight will be given to the credentials of individuals designated as team personnel in the master contractor's Task Order Proposal.

The second criteria -- criterion is the

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overall experience, capability and references for the master contractor, and the third is the master contractor's overall understanding of the Task Order RFP, which will be determined by the quality and accuracy of the technical proposal.

Yes, sir? Please identify.

MR. MOEED: Naveed Moeed from Verizon. So the question is around the capability and references. As you yourself have said, the work that we do regarding this will be confidential and almost all the references -- reference will -- let me rephrase that.

We would have a similar issue around other customers of ours who we have done this work extensively for before, but obviously who do not wish to make themselves known.

MR. GREENSTEIN: How do I reconcile that?

MR. MOEED: Uh-huh.

MR. GREENSTEIN: The way I reconcile it is

that in this particular case the fact that we have awarded a contract to you is public knowledge, what you did is not. I routinely get asked -- and I presume, you know, you all get asked by -- or ask, I get asked by vendors all the time, can we put you down as a reference. I would assume then, therefore, the (indiscernible) will be to me and it's up to me how much I want to disclose. That doesn't mean you put it generically out there and it doesn't mean that you don't call to ask if it's okay first, but I routinely do that. The fact that there is an award is a matter of public record.

MR. MOEED: Thank you.

MR. GREENSTEIN: Moving to page 41. I just want to highlight that the most advantageous Task Order Proposal, considering both the technical and financial submissions, shall be selected for the award. This is not cost-driven entirely, technical

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merit has greater weight than cost.

Just a couple other things to highlight quickly. On page 43, which is the price sheet, we're asking for pricing in two components, one for the Group 1, which is the external network penetrations, and the second for the application testing.

And that is all that I was going to highlight.

MS. GORDON: All right. I will go over that oral presentations will be performed by phone or in person for all offerors meeting the minimum qualifications. After each round of oral presentations, I shall determine whether phone or in-person presentations will be utilized. All offerors and proposed staff will be required to make an oral presentation to the State representatives in the form of oral representations. Significant representations made by a master contractor during the oral

presentations shall be submitted in writing. All such representations will become part of the master contractor's proposal and are binding if the Task Order is awarded to the master contractor.

I will notify the master contractors of the time and place of oral presentations.

In the event that more than ten qualified proposals are received, I shall elect to follow a down-select process that is more fully described in Section 5.3. And 5.3, you can go through that -- 5.3 -- okay, I lost my pages -- 5.3 basically will say that Task Order proposals will be assessed through the evaluation process for compliance with the min quals listed in Section 2. Those proposals deemed technically qualified, the associated Task Order Financial Proposal will be opened -- well, we'll go back.

One thing about your financial proposals

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when you do submit them, in Section 4 it will tell you that it's password-driven. What you must do is send your financials in a pass -- well, a password email and I will call you for the password in order to open it. If you do not do this, you will be deemed not susceptible for award. It's a very minor thing, but a very important thing.

And questions, I have some questions that were emailed to me, and I will go over them with you, plus they will also be in -- with the email along with the transcript of this pre-proposal conference.

I received questions, how many hosts are located on the networks to be tested. The answer is there are 14 active devices with Internet-routeable IP addresses in the Agency DNC and six at the DR site.

What are the type of hosts? A mixture of data security devices. For example, firewalls, anti-malware, spam appliance switches, and Window-based

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servers, for example mail, slash, terminals, slash, Web servers.

How many lines of code does each of the two applications have? 14,466 and 12,000, approximately, respectively.

Is the Agency open to sampling methodology for the lines of code which will be reviewed? The Agency expects a full source code assessment to be conducted for each application.

Does the Agency have any reporting or other deadlines which require the work being completed by a specific date? None, the answer is none.

Has the Agency performed this assessment before? If yes, when was the last assessment? An assessment similar in scope was performed in the early summer of 2012.

MR. GREENSTEIN: And that I would say is on the network, but these particular applications were

not tested at that time, they weren't available at that time. Is that -- do you accept that? Okay.

MS. GORDON: How long does the Agency anticipate this project lasting? The Agency expects this project to last between 10 to 12 weeks from Notice to Proceed to final submission of deliverables.

We did have a question where someone -- "Our company is an MDOT-certified MBE/DBE, and the solicitation is within our core service areas. However, the min quals are quite restrictive and tends to favor larger companies, which would thereby preclude many MBE/DBE firms like ours from bidding this project. Therefore, regarding Section 2.1.1, would you consider changing the language to only master contractor qualifications may be used to demonstrate meeting company minimum qualifications unless otherwise indicated to the Task Order master contractor shall

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meet these qualifications or has fostered a relationship with a partner with to meet these min quals unless otherwise indicated?"

And our answer to that is, SRA has considered this request, but it has determined that the minimum qualifications shall remain as originally stated in the TORFP.

And so other questions were exactly -- basically the same, asking if A, B, C, E would have requirements that either subcontractor or the master contractor. We did allow for item number B in the min quals to allow for subcontracting.

Does anyone have any other questions? Yes?

MR. RUPAKULA: This is (indiscernible) Rupakula from Software Consortium. The two applications that you talked about, can you provide us a little information on what these applications are trying to achieve? And the second thing is, will we have access to the architecture documents of these applications?

MR. GREENSTEIN: The answer is that you will have, you know, access to any documentation that you

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would like, you know, there's nothing confidential with what these things are doing.

The first application, Employer Payroll upload, is the application that is used by many, not all, of the employers that need service and support all around the State of Maryland, it is used by them in order to submit their files to us, so that we can then process them. So, for example, every X amount of time, every month, whatever, a particular school board, you know, submits their payroll to us. That tells us for every one of the employees that is part of our pension system for them, it tells us whether they worked full-time or not, what their compensation was, and you know, other factors that then feed into in the end the calculation of either what their benefit would be or how much we have to refund to them if they withdraw from our system.

The second application is to create a few secure Web pages off of our public Web site that can be used to -- at least initially to allow members to identify themselves and, once authenticated, we would reprint the 1099-Rs that we send to retirees, or the

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personal statement of benefits, which we send to active members that tells them here's what we think your service credit is as of this date and, you know, other factors like that, a lot of information that, you know, they would find relevant.

Does that answer your question?

MR. RUPAKULA: Yes, thank you.

MS. GORDON: Yes?

MR. MOEED: Do either of these applications perform external service calls to other departments, for instance the DAT?

MR. GREENSTEIN: All of the information that these sites will access is within this Agency, but in terms of the file submission, we host the application here. I don't know that there's an actual client software that gets loaded, I don't believe there is in the application -- there's not, okay. So that is just hosted application here, people -- you know, the employers -- and we have about 120 active employers, give or take, they would log in in order to then submit their data to us. There are specific individuals who are authorized to submit information



to us from each of the employers.

The Agency administers a variety of different plans. Each employer is a different location or multiple locations, and there are multiple different time frames for when they run payroll. We operate primarily, you know, when we make payments on a monthly basis going out, but this would be for their file submission to us, which is then used virtually whenever they have a file system in. And there are deadlines for submission and penalties if they don't submit on a timely basis. We need the information from them.

In the back?

MR. ZEVE: Yeah, Steve Zeve from Janus Associates. You've given us a rough count on the number of lines of code in the applications, is there some sense of how that breaks down into terms of number of Web pages that are being supported by each application?

MR. GREENSTEIN: We don't have that answer right here --

MR. ZEVE: Okay.

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MR. GREENSTEIN: -- I don't believe we do. You know, they're both under final development, one is about to be -- one -- the employer payroll is about to enter second pilot, the other one is being tested internally, the reprint site. But, no, I don't -- I can't tell you offhand how many pages. If you need to know that information, please email Margie in Procurement, and we will get an answer for you for how many screens there are or whatever.

MR. ZEVE: Thank you.

MS. GORDON: Yes?

MR. EWING: James Ewing, Presidio. What language are these applications written in? And then I have a follow-up question.

MR. GREENSTEIN: It's all dot net, yeah, it's all -- so I believe it's ASP, but it's all dot net, Microsoft.

MR. EWING: And then is the back end of that, is that under consideration? Do you need that looked at as well, what's on the back-end databases and stuff like that, or do you just want the application code statically checked from that

perspective?

MR. GREENSTEIN: The back end -- well, there is -- I don't know that there --

MR. EWING: The application would fill or write data somewhere probably, right?

MR. GREENSTEIN: Yes. The employer payroll does have certain edit checks and it also allows the individual employer to use last month's file as a beginning point for the current month. So in that sense, yes. And I believe all of the database work is (indiscernible) server, but it's all here.

MR. EWING: Okay.

MR. GREENSTEIN: On the other application, the reprint, basically it's just a matter of filling in the blanks and displaying the form and allowing it to be either seen or printed. Fairly straightforward. This is not, I don't believe, you know, interfaced with anything significant like our various, you know, tables, I don't think it's a live -- I think it's hitting off of an extract, actually a data extract. So that really doesn't have much of a database sitting behind it.

MR. EWING: Okay. I think that folks just really wanted to understand, is the demarc (phonetic) for testing the static code or do you also expect us to look at the static code and whatever database calls are being made and that infrastructure as well, right?

MR. GREENSTEIN: I would assume that the database calls are fair game to be included.

MR. EWING: Okay.

MR. GREENSTEIN: The database itself is all going to be standard, simple server, and I don't know that we need to test a SQL server per se.

MR. EWING: Okay, sounds good. Thanks.

UNIDENTIFIED SPEAKER: Yeah, the downstream systems would be part of that job, if there would be a vulnerability and there would be an exposure somewhere where you could actually get to that piece downstream, yeah, we would want to know that.

MR. EWING: Okay.

MS. GORDON: Yes?

MR. MCCLEARN: Richard McClearn, CAEI. I'm trying to ask a question about penetration testing and the language on page 20, it says, "Penetration testing

performed by TOR contractor shall be nonintrusive and passive-neutral, to ensure that the Agency is protected (indiscernible)." Penetration itself (indiscernible) is intrusive, not nonintrusive. Are we looking for vulnerability tests or are we really looking for a (indiscernible) test, what's (indiscernible) --

MR. TOFT: It is a penetration test, yes. I think that we put in there that any testing that would be intrusive, that we will want to know about that beforehand. That if you were going to do a test that would potentially cause data disruption on our side, our systems, we would want to know that. I'm not sure that all penetration tests are disruptive that there - - they cause -- intentionally cause damage on the internal systems, it should be gauged to where it doesn't do that. Does that answer your question?

MR. MCCLEARN: Kind of, sort of, but not really.

MR. GREENSTEIN: I would say that the word intrusive has been a point of discussion --

MR. MCCLEARN: Yeah.

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MR. GREENSTEIN: -- among various people. The point that we are trying to make is that we want to know, you know, if you can break through to the other side, if I put it in simpler (indiscernible) we don't necessarily want you to go hunting around or whatever. So if that is what you consider vulnerability, then that's vulnerability; if that's what you consider penetration, then I guess it's intrusive. Your point is -- yeah.

MR. MCCLEARN: Another question. Is there any reason for this particular pin (phonetic) testing and (indiscernible) testing, is there some sort of issue you're trying to get to or has some mandate come down to get to a certain level?

MR. GREENSTEIN: The answer is no. There's nothing imposed on us, this is we want to do it. It is a routine kind of a thing that we do periodically.

MR. MCCLEARN: Okay. I want to piggyback on the question that was asked in regards to the minimum qualifications. You have said this is a 10-to-12-week project, it's very small in nature to us, but the qualifications are gigantic, and we're trying to

figure out -- does the State know that this is not a big opportunity, a large opportunity, and why would one put the large minimum qualifications on such a small project? Because, one, it causes us to spend more money in developing a proposal to send to you based upon the criteria you have on us (indiscernible) that's one thing, it costs money to do that. And then to deliver the service is fairly simple, because we do it all the time, every day. So I just wanted to figure out what the State is thinking around that (indiscernible).

MR. GREENSTEIN: The majority of the -- in fact the entirety of the language in here is initiated by the Agency and then has to go through review in Annapolis. There is a great deal of template in here. The credentials -- if what you're saying is that we're expecting a lot of credentials in order to do this, we expect competence and, you know, according to what it is. If what you're saying is preparing a proposal to demonstrate that is a very complicated process or lengthy process, I understand that, but the preparation for the format and exactly what it is that

is needed to be submitted is largely State template. And I don't know how else to put that.

We don't see this as a 500-page with many graphics kind of submission. What we're looking for is a demonstration of credentials to do the work, we're looking for competency, and -- you know, in fact I would discourage submitting a 500-page, you know, with examples and all of that. This -- you know, the last time we did this that particular question did not come up, and I would hope that the response that I'm giving is sufficient to sort of put a flavor on it.

MR. MCCLEARN: We meet most of the criteria, but I'm looking at it for not only myself, but my fellow -- other companies. What happens is we all go through the process to get to where we are today where we can sit and talk to you --

MR. GREENSTEIN: Yes.

MR. MCCLEARN: -- that's already been vetted.

MR. GREENSTEIN: Right.

MR. MCCLEARN: We can do this type of work, right? Now you take this big, gigantic pool, you put



all this requirement, now you shrink the pool down to 12 companies when you really could be accessing 50 companies with fair, competitive pricing in here that can actually do the work, but you've shrunken the pool down so much. And this has happened quite a bit lately with having minimum qualification, a lot of the small firms, medium firms from participating that can do this work and do it well, and do it at a fair price.

MR. GREENSTEIN: I hear what you're saying.

MR. KISER: Could we just go back to your original question, which had to do with the amount of intrusiveness. I think it's qualified if you read the rest of the sentence. It's nonintrusive to the point that it's not going to impact our production systems and something is not going to be, you know, taken offline or, you know, data changed, those type of things. But you're right, it is intrusive in nature, but that's the qualification for that and it's not disruptive to our production systems.

MR. GREENSTEIN: There are semantic differences between various people when they're

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looking at the word intrusive, I would readily concede that point and it had been a point of discussion between, you know, various parties before this RFP was put together.

MR. MCCLEARN: And I heard a question, was there a question around or answer around the lines of code, how many lines of code there was to be assessed?

MR. TOFT: It's 14,000 -- the one application is 14,222, and then the other one was an estimate of about -- around the same number, about 12,000.

MR. MCCLEARN: 12,000?

MR. TOFT: And I was talking to the developer. It's kind of hard to quantify that number since it's a dot net framework-based application and you have modules involved, and even during the execution of the application itself there's compiling going on in the background. So it's really hard to quantify that down to those kind of numbers.

MR. MCCLEARN: And this is a firm fixed price, correct?

MS. GORDON: A firm fixed price, yes.

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Yes?

(Pause.)

MS. GORDON: Yes.

MR. MCCLEARN: My last question --

UNIDENTIFIED SPEAKER: (Indiscernible).

MR. MCCLEARN: -- my last one. I was (indiscernible) there was going to be remediation, recommendations for remediation, is it the State's preference that the organization that did this remediate (indiscernible) contract, does that fall within this contract or whether that's going to be something totally and separately done?

MR. GREENSTEIN: Let's say that we expect to be able to remediate ourselves, you know, given the information that is there.

MR. TOFT: Yeah. For instance, the last time we engaged in this task, we had a code review and it was found we did have vulnerabilities in our code, and our programmers went back and corrected the vulnerabilities. So, yeah, there was definitely a -- we did the remediation ourselves.

MR. MCCLEARN: Thank you.

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MS. GORDON: Just --

MR. ZERNHELT: I know the State came up and changed the way they looked at this. If an MBE primes this, do they get any credit towards the 30 percent or does that --

MS. GORDON: You can only claim 50 percent of your MBE.

MR. ZERNHELT: Okay.

THE COURT: And there are no sub-goals. You can read as far as the min quals will state and the MBE portion will state what you need to have done. As I said, in Section 4 is all the proposal formats and submission requirements, please read them over very carefully. I did get a question about asking for some forms in Word format instead of PDF. I can send some of the forms in Word, but there are some forms that must stay in PDF format because we don't want anything changed in them. So if anyone needs like the resume forms in Word format or forms like that, I have no problem sending them to you in Word format.

MR. GREENSTEIN: The last question was from Software Consortium, correct?

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MR. ZERNHELT: Yes, sir (indiscernible) --

MS. GORDON: Any other questions? Yes?

MR. MOEED: You actually half-answered my question around the forms --

MR. GREENSTEIN: And you're with Verizon, correct?

MR. MOEED: Sorry, yes. Naveed Moeed with Verizon. So thank you for being able to provide some of the forms in Word format. It's my understanding that not all of these -- some of these forms are to be submitted during the duration of the project and some of the forms are to be submitted as part of the proposal.

MS. GORDON: Absolutely.

MR. MOEED: So out of the ones that you will send us in Word format, can you indicate to us which ones are going to have to be submitted prior to the proposal, but --

MS. GORDON: I can send things like the MBE forms in Word format, the min quals qualification summary and attachment of the personnel resume form, the price sheet in Word format. Things like the --

the agreements or things of that nature in here, I cannot do that, but all the MBE forms I can -- the Minority Business, I cannot do the Task Order agreement, labor classification, personnel resumes, Agency Deliverable Product Acceptance form, non-disclosure agreements. I think that's it. If there's anything that you see that you'd like me to send in Word format, just send me an email and I will review it.

MR. MOEED: Thank you.

THE COURT: Yeah. I think that's it. If there's anything that you see that you'd like me to send in Word format, just send me an email and I will review it.

MR. MOEED: Thank you.

THE COURT: I think -- yes?

MR. MOEED: And I have a follow-up question as well, which is regarding the personnel resume forms. As the Agency may be well aware, the consultants that we have on the bench today may not necessarily be the consultants that we have available tomorrow. Is there a requirement that the personnel

resume forms that are submitted as part of the proposal be exactly those personnel who turn up?

MR. GREENSTEIN: I would look at the provisions related to key personnel. We are instructed that we can only evaluate credentials that are submitted -- Margie, correct me if I'm wrong on this -- but that sort of says that a statement such as here's someone's resume and we have many people who have similar kind of credentials, that we can only evaluate what gets submitted. And there are certain -- and they are spelled out in the Task Order RFP in terms of how many you're allowed to identify, what the substitution criteria are and so on, but I think it was very clear to us -- and I understand, I spent 12 years of my life on your side of the table, I understand what you're saying, and all I can tell you is that the terms and conditions as they are stated in the Task Order RFP govern this.

MR. MOEED: Thank you.

MR. GREENSTEIN: Okay?

MR. MCCLEARN: Richard McClearn, CAEI. I want to (indiscernible) I was just going to ask the

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question, because I thought I heard you say that you anticipate giving an award in 90 days? So the State is saying that the resumes submitted in 90 days they are going to want the same person available in 90 days? I just want to make sure (indiscernible).

MR. GREENSTEIN: What I believe we said is that the duration from the Notice to Proceed to the conclusion is 90 days. However, from the time you submit to the time of the Notice to Proceed, we have not, I don't think, specified a particular time frame. In addition, I think depending on what you propose and the methodology you use, it might not be 100 percent of a given individual's time for 90 days, in fact I would expect that it would not be. And so in that sense -- yeah, I don't know what else to say.

MS. GORDON: Read Section 3.7.3, Substitution of Personnel. "Prior to Task Order execution or within 30 days after Task Order execution the offeror may substitute proposed key personnel only under the following circumstances: Vacancy occurs due to the sudden termination, resignation or approved leave of absence due to extraordinary personnel event

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or death of such personnel. To qualify for such substitution, the Offeror must describe to the State's satisfaction the event necessitating substitution and must demonstrate that the originally proposed personnel are actual full-time, direct employees with the Offeror. Subcontractors, temporary staff or 1099 contractors do not qualify. Proposed substitutions shall be of equal caliber or higher, in the State's sole discretion. Proposed substitutes deemed by the State to be less qualified than the originally proposed individual may be grounds for pre-award disqualification or post-award termination."

MR. GREENSTEIN: The language that Margie just read, we did not propose this.

MS. GORDON: This is the State.

MR. MCCLEARN: We're very familiar with the State. The reality is that we would like to know -- and I know everyone else would like to know -- how soon you think you will be awarding that. I know it's going to be predicated on how many days you get, but it would be good to know because that would change a little bit about how we might approach it from a

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resume standpoint, because like (indiscernible) said, who is available today to work next week or two weeks from now possibly will not be available to work in 30 days or 45 days because he's assigned to another project or whatever the case may be. So that's something you guys ought to take back and give us an answer back before you give us a time table (indiscernible) anticipate the start and anticipate (indiscernible) but that will give us --

MR. GREENSTEIN: Let me just say that the Agency is not looking to delay this or stall. The process that we follow is spelled out and we don't -- you know, we've got Thanksgiving in there --

MS. GORDON: And you have Christmas.

MR. GREENSTEIN: -- you've got Christmas in there.

MR. MCCLEARN: Yeah.

MR. GREENSTEIN: We have to -- because this is a Task Order under a master contract, we can write a memo to the Department of IT in Annapolis saying here is who we recommend and why, but in the end we do need their thumbs up. So how long that takes I can't

tell you. I do know that it is not our intention to stall or delay, and we will move as expeditiously as is practical, you know, through this process.

MS. GORDON: Once we get -- you know, the proposal closes on October 23rd, 2:00 p.m., I and my copartner go over all of the emails that we get, all the forms to make sure everybody has filled out everything, that everybody is in compliance. If you're not in compliance, then cure letters go out. They go out continuously until everything is cured. The only thing that I can tell you, everybody, MBE forms cannot be cured. If you get it wrong, you are not in compliance and you are not susceptible for award. Other than that, anything basically can be cured.

Once everything is cured, all the proposed technical proposal will go to the evaluation committee, they will review them. During that review we will do oral presentations, whether they be phone or in person, that will be decided upon. Once the oral presentations are done, then we rank everybody, 1 through 10, what have you. Then the financial

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proposals will be opened, rank them. If we need to send out a best-and-final offer, we will do that, that will come in. Final technical -- final rankings will come into effect. As I said, technical will merit more than financial.

Once that is done, the Agency will make their recommendation. We will start getting all of the notices -- a notice of intent will go out to the particular awardee, and then it goes to the Department of IT for their approval. All the paperwork comes in and (indiscernible).

MR. MCCLEARN: Last question for me. Who did the work in 2012?

MR. GREENSTEIN: I want to get the name right. It was done by HP State and Local Enterprise Services. I think that is the --

MS. GORDON: Hewlett Packard.

MR. GREENSTEIN: -- formal name.

MS. GORDON: Hewlett Packard State and Local Enterprises.

MR. GREENSTEIN: Was it Hewlett Packard or HP?

MS. GORDON: It's HP State and Local Enterprises.

MR. GREENSTEIN: Yeah -- no, no, we've had this --

(Laughter.)

MS. GORDON: Subsidiary.

MR. GREENSTEIN: And I'm not sure that given the reorganization of the company since then that the title is exactly the same even of that group today.

MS. GORDON: Yes?

MR. ZEVE: I have a couple of unrelated questions, so, you know, stop me if I'm going on too long. The first one is, on page 36 of the RFP you talk about a draft risk assessment, is this intended to be a risk assessment document about risks in completing the project?

MR. GREENSTEIN: I'm looking at it.

(Pause.)

MR. GREENSTEIN: This is boilerplate language.

MR. ZEVE: I figured as much.

MR. GREENSTEIN: And it's intended to -- for

you to identify what the risks might be for your capability to complete the work. If I'm reading this thing correctly -- yes, it's not a risk assessment as this -- as the scope of work, this is a risk assessment of your, you know, capability of delivering on the contract performance.

MR. ZEVE: Okay. A related item to that, there's a reference to Section -- to risk assessment as to deliverable in Section 3 where the -- that that would be a final of this draft risk assessment. I did not see any information about that in Section 3, does that mean that there is only this draft going in?

MR. GREENSTEIN: That is also a boilerplate issue.

MR. ZEVE: I recognize PMP (phonetic) style boilerplate, yes.

MR. GREENSTEIN: For an engagement -- and this is where I'm going to step out on a limb a little bit, okay? -- for an engagement of this scope and size, I would hope that there is not a significant difference once -- between what the risk assessment of delivery of the work would be and a final risk

assessment. I would hope that it is a risk assessment, then that's fine.

MR. ZEVE: Okay.

MR. GREENSTEIN: I could understand this a little bit more if this were a \$10 million application development project that was going to last three years. I think it's a little harder to respond to what you're asking for something with a 90-day duration.

MR. ZEVE: Right. Okay. So my next item -- I'm sorry, I forgot to say, my name is Steven Zeve, I'm from Janus Associates.

MR. GREENSTEIN: Did I respond to your question completely?

MR. ZEVE: Yeah, well enough.

MR. GREENSTEIN: Okay.

MR. ZEVE: Well enough, I think. I notice in Section 3.7.5 on page 24 it -- the RFP says that the Task Order contractor will provide all necessary office space, network product required, work station, hardware, blah, blah, blah, and that means us, correct?

MR. GREENSTEIN: Yes.

MR. ZEVE: Okay.

MR. GREENSTEIN: If you need -- you know, if you're coming in and you need space here, we'll find you some space.

MR. ZEVE: Okay.

MR. GREENSTEIN: This is not expected to be an engagement that will require lots of on-site time.

MR. ZEVE: Okay.

MR. GREENSTEIN: It is an external test and we would expect that it will be conducted primarily externally.

MR. ZEVE: Well, part of the reason I ask is that you're asking -- basically, you're asking us to do a code review as part of this and we have done work for some other state agencies where they said no, no, no, you have to look at the code on-site.

MR. GREENSTEIN: No, that's fine.

MR. ZEVE: Okay.

MR. GREENSTEIN: I mean, we are pragmatists.

MR. ZEVE: Okay.

MR. GREENSTEIN: And if you need to be on



site, then you need to be on site, but we're not precluding -- I think what the intent here is to say we don't think you're going to be having, you know, 15 people here on site for ten months. You know, this is a relatively small scope. To the extent that you need to be on site, we'll make -- you know, we're not dogmatic about anything related to that.

MR. ZEVE: Okay.

MR. GREENSTEIN: I understand that in -- and to the point that the application is not developed and deployed, it's hard to do an external test when we don't expose it externally.

MR. ZEVE: Understood, yes.

MS. GORDON: Yes? Verizon.

MR. MOEED: Verizon, still Verizon. As part of the work in 2012, were there any social engineering done as part of the penetration test and do you expect the same this time?

MR. GREENSTEIN: There was no social engineering involved and we would expect it to be the same this time. There was in parallel -- and this is -- you know, there was an award in 2012 to do an

internal security assessment, an internal IT security system, looking at the internal risks. And it was a risk assessment, but not an audit that was also conducted on the Agency, which did go into those kinds of, you know, issues, but that's -- this is not what we're envisioning here.

MS. GORDON: Yes?

MR. ZEVE: Steve Zeve again. You made a statement earlier and it probably fell out of the back of my brain about password protecting part of the submission and --

MS. GORDON: Okay, that's in Section 4.

MR. ZEVE: Uh-huh.

MS. GORDON: And --

MR. ZEVE: Okay, there it is.

MS. GORDON: It says -- in 4.2.1, it says, "The Task Order financial proposal shall be contained in one email containing as attachments all submission documents detailed in Section 4.4.2 with password protection."

MR. ZEVE: Okay.

MS. GORDON: "MSR will contact Offerors for

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the password to open each file. Each file shall be encrypted with the same password. The Task Order Procurement Officer will contact only those offerors with Task Order proposals that are reasonably susceptible for award. Offerors that are unable to provide a password that opens the Task Order financial proposal documents will be deemed not susceptible for award. Subsequent submissions of financial content will not be allowed." And then it goes on to tell you just what --

MR. ZEVE: If there are multiple documents, would it be acceptable to pile them all into an encrypted zip file rather than encrypting them separately?

MS. GORDON: I guess so. If they're --

MR. GREENSTEIN: It's your call, not mine.

(Laughter.)

MS. GORDON: If they're all password-protected, I mean, if that whole complete file is password-protected, I don't see why not.

MR. ZEVE: Okay. Yeah, we've done that with other kinds of things in the past, so I was just

curious. All right, thank you.

MS. GORDON: Is that it?

All right, gentlemen. On behalf of the Maryland State Retirement Agency, we would all thank you for your interest in doing business with the State of Maryland. A copy of this transcript and the questions and answers of anything else that you have will be emailed to all offerors. And just keep in mind that the closing date is Friday, October 23rd at 2 o'clock p.m.

Thank you very much. This will conclude the Task Order Pre-Proposal Conference and have a lovely day.

(At 11:10 a.m., the conference was concluded.)

## CERTIFICATE OF NOTARY

I,

CHRIS HOFER, the officer before whom the foregoing testimony was taken, do hereby certify that the witness whose testimony appears in the foregoing transcript was duly sworn by me; that the testimony of said witness was taken by me by stenomask means and thereafter reduced to typewriting by me or under my direction; that said testimony is a true record of the testimony given by said witness; that I am neither counsel for, related to, or employed by any of the parties to the action in which this testimony is taken; and further, that I am not a relative or employee of any attorney or counsel employed by the parties hereto, nor financially or otherwise interested in the outcome of the action.

This certification is expressly withdrawn and denied upon the disassembly or photocopying of the foregoing transcript of the proceedings or any part thereof, including exhibits, unless said disassembly or photocopying is done by the undersigned court reporter and/or under the auspices of Hunt Reporting Company.

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My Commission Expires:

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**SRA-16-07**  
**EXTERNAL NETWORK AND APPLICATION SECURITY TESTING**  
 Friday, October 9, 2015 - 10:00 AM

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