



Peter Franchot
Comptroller

Dennis J. Krysiak, CPA
*Director
Administration & Finance*

**Pre-Proposal Conference
Help Desk, Application & System Support
CATS+ TORFP # E00B9400036
Comptroller of Maryland/Register of Will
80 Calvert Street, LLG Treasury Building
Assembly Room, Annapolis, MD 21401**

March 19, 2019 – 9:00 A.M.

- I. Welcome and Introduction..... Bernice Jeffries, TO Procurement Officer
- II. Opening Remarks Jasneet Kapur, COM ITD Program Manager
Register of Wills
- III. General Procurement Information & Key Dates.....Bernice Jeffries, TO Procurement Officer
- IV. Scope of WorkJasneet Kapur, COM ITD Program Manager
Register of Wills
- V. MBE/VSBE Goal..... Mike Balderson, IT Procurement Manager
- VI. How to Submit a Proposal.....Bernice Jeffries, TO Procurement Officer
- VII. How Your Proposal Will Be Evaluated.....Bernice Jeffries, TO Procurement Officer
- VIII. Questions and Answers Period ALL
- IX. Closing Remarks.....Bernice Jeffries, TO Procurement Officer

We will attempt to answer every question, but our responses may be subject to clarification later. Furthermore, the responses given verbally today by state representatives are not binding upon the state 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 State, if received by April 9, 2019; 10:00 AM. The resultant questions and answers (Q&A's) will be distributed, via email to all CATS+ Functional Area 5 Master Contractors. Q&A's will also be posted on the DoIT CATS+ website (<http://doit.maryland.gov/contracts/Pages/CATSPPlusTORFPStatus.aspx>). Also, should issues be raised which cause the TORFP to be amended, a copy of the addenda/ amendment will be emailed to all CATS+ Functional Area 5 Master Contractors & posted on the DoIT CATS+ website.



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Pre-Proposal Conference Minutes
CATS+ TORFP E00B94000036
Comptroller of Maryland
Register of Wills (ROW)
Tuesday, March 19, 2019, 9:00 a.m. Local Time

Attendees: Mike Balderson, IT Procurement Manager, Bernice Jeffries, TO Procurement Officer, Jasneet Kapur, ITD Program Manager/TO Procurement Manager, Margaret Phipps, Register of Wills, and Greg Staub, Anne Arundel Register of Wills Office (Technical).

The following is a summary of pre-proposal conference for the State of Maryland for Register of Wills (ROW) CATS+ TORFP # E00B94000063 for help desk, application and system support. The meeting was called to order at approximately 9:02 a.m. by Bernice Jeffries the TO Procurement Officer.

Ms. Jeffries welcomed and thanked the offerors for attending the pre-proposal conference. Each Maryland State representative and Register of Wills individual on the panel introduced themselves.

Purpose

The main purpose of the pre-proposal conference is to provide potential offerors with an overview of CATS+ TORFP solicitation for the State of Maryland Register of Wills. The solicitation is to acquire information technology expertise for Help Desk, Application and System Support for ROW. Although Master Contractors will have an opportunity to ask questions, they would still need to submit their questions in writing to the Procurement Officer via email: ITPROCUREMENT@comp.state.md.us.

Summary of Minutes

I. Background and Scope of Work – Jasneet Kapur

Opening remarks to the Master Contractors focused on the relationship between Maryland State and the Register of Wills and how the registering of wills in Maryland is handled by the Register of Wills office in each jurisdiction. The number of Register of Wills (ROW) office locations in the various countries in the state Maryland consists of a total of twenty-four (24) local jurisdictions in twenty-three (23) counties and Baltimore City. The Registers are independently elected State officials for each of the local jurisdictions.

A brief synopsis was provided for their understanding on the level of support provided by the State of Maryland to ROW before explaining the Scope of Work.



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Scope of Work - A brief discussion concerning the characteristics of hardware and software operated at the ROW office locations.

II. General Procurement Information – Bernice Jeffries

The minimum qualifications for key personnel that a contractor must meet in order for their proposal to be evaluated is found on Page 6 in Section 1.1. The link listed will provide the various labor categories for key personnel and their minimum qualifications. In addition, Page 31 outlines the preferred technical qualifications and experience for key personnel.

Master contractors were informed that they shall be familiar with the entire solicitation and the key personnel named in their proposal shall be available at the beginning of the contract when Notice to Proceed (NTP) is issued

III. Key Dates – Bernice Jeffries

The TORFP key dates are as follow:

- Questions due to the Procurement Officer by April 9, 2019, 10:00 a.m.
- Proposals due April 18, 2019; 9:00 a.m. local time
- The Procurement Officer will only accept proposals that HAND DELIVERY or MAILED; in accordance with Instructions listed on Page 43; Section 5.3: "Proposal Packing and Delivery".

IV. MBE/VSBE Goals – Mike Balderson

This solicitation has a twenty-one (21) % MBE Subcontracting Goal and a No VSBE Subcontracting Goal. Mike asks all Master contractors to show by the raising of your hand if they are MBE. He proceeded by expressing the importance of filling out the MBE forms correctly and signing where applicable because those are common mistake made by contractors. Lastly, if you are certified MBE, you cannot claim 100% of the work.

The MBE documents – Attachment D

VII. How Your Proposal Will Be Evaluated – Bernice Jeffries

During the evaluation of proposals for this CATS+ TORFP, technical qualifications will be evaluated more favorably than price.

Page #31, SECTION 3.9.2, Offeror's Experience: The master contractor's experience **SECTION 6.2** is expected to be a part of the proposal and will be evaluate as part of the TO Technical Proposal process, to include capabilities, and references evaluation factors.



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SECTION 6.2 Technical Evaluation Criteria on Page 49 explains how contractors shall prepare and submit their Technical Proposals for evaluation.

SECTION 3.9.3 – Is a list Key Personnel Experience which is required to be a part of the Technical Proposal.

SECTION 3.9.4 - Number of Key Personnel shall consist of four (4) and the named personnel in the Technical Proposal shall be available at the beginning of the contract when the NTP is issued.

3.9.5 LABOR CATEGORIES labor categories list the labor categories for key and non-key personnel.

Mike Balderson:

An overview of the price sheet outlining the maximum labor hours for each labor category (key and non-key) personnel over an expanded period of five (5) years - Attachment B. TO Financial Proposal will not be opened/evaluate until final evaluation of the technical proposal. Read page 49. Each Master Contractor will base their own company labor rates start in year seven (7) of the CATS+ Master Contract. Due to the value of the TORFP, it will require BPW approval before award.

VIII. Questions and Answer Period - Bernice

The floor was opened for questions and answer. Offerors were encouraged to submit all questions in writing no later than April 9, 2019; 10:00 a.m. to the Procurement Office via email at (ITPROCUREMENT@comp.state.md.us). All questions and answers will be published on the CATS+ website.

Closing Remarks – Bernice

All offerors were thanked for attending the pre-proposal conference and if they did not sign in to please do so before exiting and pick up a copy of the handout listing the Register of Wills site locations.

The meeting adjourned at approximately 10:10 a.m.

Minutes were issued March 20, 2019

Pre-Proposal Conference

Help Desk, Application & System Support CATS+ TORFP # E00B9400036

Tuesday, March 19, 2019, 9:00 a.m.

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