



October 16, 2017

Summary – Pre-Proposal Conference

Title: Form Processing & Workflow Automation Agile Services

CATS+ TORFP#: F50B8400012

at

100 Community Place, Crownsville MD 21032

10:30am in-person and via phone

The pre-proposal conference began at approximately 10:32am. Phone attendees were asked to identify themselves.

I) Welcome and Introduction:

Ms. Sini Jacob, the Department of Information Technology (DoIT) Procurement Officer for this project, welcomed everyone in attendance. Introductions were made of the State employees in attendance:

- Sini Jacob – Procurement Officer
- Lance Schine – Deputy Secretary, DoIT and TORFP Contract Manager
- Scott Moore – Assistant Attorney General



II) General Procurement Information:

Ms. Jacob told the group the purpose of the pre-proposal conference was to give everyone guidance on the State procurement process and to provide an overview of this TORFP. She emphasized that today's session is merely for guidance and attendees should not rely on verbal communications for information regarding the TORFP. Questions and comments must be submitted in writing, by email, to the Procurement Officer for a formal response. She then gave an overview of the TORFP, highlighting important portions of the solicitation, including:

- She reminded everyone to be sure to review the Key Information Summary Sheet on page 2.
- She reminded everyone of the closing date of questions as Noon Tuesday October 17, 2017.
- She reminded everyone of the proposal due date as Wednesday October 25, 2017 2PM Eastern Time and that late proposals would not be accepted.

III) MBE/VSBE Requirements

Ms. Jacob told the group the TORFP has no MBE or VSBE goals.

IV) Submission Requirements:

Ms. Jacob told the group the following information regarding the submission of proposals:

- DoIT strongly desires submission of Proposals via email. Those who wish to submit a hard copy of their proposal, in the form identified in Section 5 beginning on Page 28 of the TORFP, should contact the Procurement Officer.
- Per section 5.2 of the TORFP, all proposals shall be submitted in 2 separate volumes. Volume I is the Technical Proposal, and Volume II is the Financial Proposal. The directions for proposal packaging and delivery are outlined in Sections 5.3 thru 5.5. Ms. Jacob also advised that those proposals with commingled Technical and Financial Responses will be deemed not susceptible for award.



- Ms. Jacob informed the group that she can only receive emails less than or equal to 25 MB in size. If a submission exceeds this size, Offerors were told to split the submission into two or more parts and include the appropriate part number in the subject line (e.g., Part 1 of X, Part 2 of X, up to Part X of X).
- Ms. Jacob reminded vendors to pay close attention to the submission instructions in Section 5.3 and 5.4 when creating your technical response; it should be in the same order as listed in these sections. Doing so will help ensure that your proposal addresses everything as required. In addition, if all required forms and affidavits are not filled out, your proposal may be deemed not susceptible for award. Some of these forms cannot be cured if filled out incorrectly and may result in the proposal being removed from competition.
- Ms. Jacob informed the group to clearly identify the solicitation point of contact who can be reached while the proposal is in the evaluation process and advised vendors to list the solicitation contact on the cover sheet or near the beginning of the proposal.
- Ms. Jacob informed the group that the financial volume must contain all price information in the format specified in Attachment B which is the Excel spreadsheet attachment that was provided and to review the Financial Proposal instructions (Attachment B) very carefully along with special attention to each of the Excel workbook tabs at the bottom of the Attachment B spreadsheet, and please submit your Financial Proposal on the price sheets provided. Failure to properly complete the price sheet(s) or to sign the price sheet(s) may result in a determination that your proposal is not susceptible for award.
- Finally, Ms. Jacob informed the group that both the Technical and Financial Proposals volumes must be password protected. One password should be used for all items within Volume I, the Technical Proposal, and a separate, unique password should be used for all items within Volume II, the Financial Proposal. The solicitation point of contact should be given the passwords for your Proposal. The Procurement Officer will contact the solicitation point of contact for the appropriate password when the State begins its evaluation of the firm's response. Ms. Jacob also advised that the corporate contact also store the passwords for your company's Proposal in case the identified solicitation point of contact cannot be reached.
- Ms. Jacob pointed out Table 1 in Section 7 to assist vendors with the numerous documents to be submitted for the TORFP. This Table indicates what Attachments are required and when they should be submitted.



V) Scope of Work

Lance Schine spoke to the group regarding the background, purpose, and requirements of the Scope of Work for this Task Order. His remarks included:

- The purpose of the TORFP - to assist the State in its pursuit to modernize many Legacy systems that currently exist.
- The State's intent to award this to a single Master Contractor.
- This particular project is focused around licensing and permitting which exists across over 35 agencies.
- The State is looking to ensure the offeror has experience implementing solutions on the Force.com platform using APEX as we are using this platform to modernize some of our backend workflows.
- The State intends to use Elasticsearch as our search engine on our portal and plans to digitize many non-complex paper forms using Seamless Docs. These are all goals that we will aggressively be pursuing and so we need this expertise Day One.
- The purpose of Work Order #1 is to create a single portal that citizens or visitors of the state can go to in order to locate information about a permit or license including instructions on how to apply for one. This will eliminate the need for a citizen or visitor to know which agency supplies the particular permit or license they are seeking. This also provides a single user experience no matter which agency provides that license or permit. The initial work order will be to procure the talent to build the portal from start to production in approximately 1 month. The portal will be populated from data that the state is currently gathering into a database. The portal must be modern, intuitive and scalable.
- We anticipate issuing Work Order 1 immediately upon Award of this TORFP. It's imperative that the task order contractor is ready to immediately provide the agile team that will be creating the portal so we can move as rapidly as possible. We want to deliver the portal December of this year -- approximately one month after award.
- The next phase of this project which may operate at some point in parallel to the first work order will be to begin to modernize legacy processes that are currently required to apply for licenses and permits in the state of Maryland. Some of them are currently paper processes, some are part electronic and part manual, and some are electronic but need improved systems and updated business processes.
- In addition to the user experience being improved, the back end experience will also be modernized. Automating as much workflow as possible as well as allowing for parallel processing on the back end will not only improve the response time to the customer but will also improve accountability.
- The state has adopted an enterprise agile development and implementation methodology. The task order contractor shall follow a mature agile methodology.



VI) Questions and Answers

At this point, the meeting was opened up for questions. Ms. Jacob again requested all Offerors to submit their questions in writing for a formal response. She explained that answers to those questions will be distributed in an official Q&A response from the State, distributed to all Master contractors and posted on the DoIT website. Also, Ms. Jacob reminded everyone again that only written answers should be relied upon. Question topics raised included:

- State data to be provided for the portal format (Mongo anticipated) and possibility of using open source
- Whether this project is related to MD THINK initiatives
- Whether front-end portal technology has been determined
- Whether any information on existing legacy forms is available
- Whether MVA will become part of the intended portal
- Whether visitors to the portal are required to authenticate
- Minimum Qualifications must be met by the Prime Contractor
- Whether any sole incumbent exists
- Walkthrough of Table 1 in Section 7
- Walkthrough of the Price Sheet
- Evaluation of pricing and overall TORFP evaluation

Phone attendees were given an opportunity to raise questions, none were raised.

VII) Closing Remarks:

Ms. Jacob reminded all potential Offerors to follow the layout as described in the TORFP when creating their proposal. She reminded everyone that a Summary of today's meeting and list of all attendees will be distributed as soon as possible.

Ms. Jacob then thanked everyone for their attendance and the meeting was concluded at 11:10am.

Lastly, late Phone attendees were asked to identify themselves.



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