PRE-PROPOSAL CONFERENCE
SOLICITATION NUMBER CATS+/TORFP-G20B7400009

SYSTEMS DEVELOPMENT AND
BUSINESS ANALYST SUPPORT SERVICES

THURSDAY, DECEMBER 21, 2017 2:07 P.M.

Maryland State Retirement Agency
120 East Baltimore Street, 16th Floor
Baltimore, Maryland 21202

PRESENT FROM MSR:

MARGIE GORDON, Senior Procurement Officer
IRA GREENSTEIN, Chief Information Systems Manager
ROBERT DIEHL, Deputy Chief Information Systems Officer
JOHN HAYNES, Assistant to Ms. Gordon
THOMAS MONTANYE, Director of Systems Development
CHANDRA PURANAM, Chief Business Operations Officer
ALSO PRESENT:

PRIYANK DEVENRAJ, OBXtek, Inc.
VALENTINO KORICKI, DXC.technology
AMY TIMMONS, DXC.technology
PRAFUL PATEL, OHM Systems
NARAYAN ATHREYA, ICube Systems, Inc.
BALAJI BALA, PMP, Health IT
TOM WOLF, International Software Systems, Inc.
MARK WAINWRIGHT, International Software Systems, Inc.
SHANNON MARKER, Momentum, Inc.
AMBER SCHAD, Gantech, Inc.
STANLEY NAZAIRe, PMP, CISSP, MCTTP, Blue Sun Technologies
LEO HUSSEY, Computer Aid, Inc.
SANDEEP HARJANI, Infojini Consulting
ASH KAPUR, Advance Digital Systems
ASHWIN SABOO, Creative Information Technology, Inc.
RANDOLPH WILLIAMS, TriTech Enterprise Systems, Inc.

REPORTED BY: CHRIS HOFER, Notary Public
MS. GORDON: Okay. Let's get started. Good afternoon, everyone. This pre-proposal conference is for the TORFP Systems Development and Business Analyst Support Services, a CATS+ contract.

I just want to inform everyone that this pre-proposal conference is being recorded via Hunt Reporting, and we would ask that when you ask a question that you say your name and the company that you are with so that it will be transcribed onto the minutes.

Once we receive the minutes from Hunt Reporting, then I will e-mail them out to everyone on the CATS vendor list. And we'll start off with introductions. We'll start that way.

MR. MONTANYE: My name is Tom Montanye. I'm the Director of Systems Development.

MR. DIEHL: Bob Diehl, Deputy Chief Information Systems Officer.

MR. PURANAM: Chandra Puranam, Chief
Business Operations Officer.

MR. GREENSTEIN: Ira Greenstein, the Chief Information Systems Officer.

MS. GORDON: I'm Margie Gordon, the Senior Procurement Officer, and my assistant will be coming in here shortly. His name is John Haynes. He was the one that escorted you here.

We'll go over the key information sheet that I asked everyone if you didn't have one to pick it up -- pick it off of the table, and basically gives you all the information that you need to know about this TORFP.

This CATS+ is off of the Functional Area 5 for software engineering. The closing date and time is January the 16th, of next year of course, by 2:00 p.m. And that is not by 2:01 or two minutes and two seconds. Must be by 2:00, otherwise it will not be accepted. No late bids are accepted.

This is a time and materials contract, and at some instances, a fixed price. It's a five-year
contract that will begin, hopefully, on February 1st
with no exceptions -- extensions. Excuse me, with no
extensions.

The MBE goal is 30 percent.

There is no VSBE goal, which is Veterans
Small Business.

There is -- this is not a small business
reserve, and there's no federal funding.

The primary place of performance is Maryland
State Retirement Agency.

We'll read over the Section 1, 1.3, which is
the task order agreement. And that -- based upon an
evaluation of the task order proposal responses, it's
anticipated that two master contractors will be
selected to conduct the work defined in Section 3,
"Scope of Work."

A specific task order agreement, Attachment
3, will then be entered into between the state and the
selected master contractors which will bind the
selected master contractors, task order contractor, to
the content of its task order proposal including the
task order financial proposal.

The submissions -- we will not accept
submissions after the date and exact time stated in
the key information sheet. We will also ask for
submission by e-mail. If you request to submit by
paper, hard copy, then please contact me, and I will
give you the instructions for that.

Requests for extensions of this date or time
will not be granted, and your -- we go to 1.5 which is
the oral presentations. At this, there's -- this is,
kind of, an error in this. It says that "All master
contractors and proposed staff will be required to
make an oral presentation." That is not correct.
Only those who are deemed susceptible for award will
be called in for oral presentations.

There will be a screening of people who are
not susceptible for award, and they will be notified
before orals are scheduled. We really don't want to
waste your time or ours by interviewing everybody.
Section 1.11 refers to travel. It says "Expenses for travel and other costs shall not be reimbursed."

Minority business, we've had a -- I will say it's 30 percent, and the prime contractor, if you are an MBE, you can only claim up to 50 percent of that 30 percent goal. You must have a subcontractor for the other 15 percent.

And see -- oops. I'll pause for the cause.

MR. HAYNES: Excuse me, gentlemen. If you can sign in and leave all your business cards?

MS. GORDON: For the -- we'll continue.

For the minority business, all the forms that are included in this document for MBE, a failure to submit these forms, sign and submit them, will result in a rejection of your proposal because there is no cure for incorrect MBE forms.

So please read them very carefully, fill them out very carefully. If you have a problem or a question about them, please feel free to contact me,
and I will help you through them.

    And now, I'm going to turn it over to Mr. Ira Greenstein to go over min quals, scope of work, and some other things.

    MR. GREENSTEIN: Okay. Thank you.

    I'm going to review the RFP in order, and I'm going to skip my way through it, just hitting on certain highlights.

    I do want to emphasize again that this is time and materials as a baseline. However, there may be work orders that will get issued under this that may be fixed price, and so we wanted to leave the option open for both. But fundamentally, the base of this is time and materials. Okay?

    Skipping ahead to page 14, Section 2.1.1 is the offeror's company minimum qualifications. Second paragraph reads, "Only master contractor qualifications may be used to demonstrate meeting company minimum qualifications." That in -- specifically means that subcontractors cannot be used
to meet offeror minimum quals, and that is by
instruction from the Department of IT in Annapolis.
That is not our choice.

It then goes on, it says, "At least two
years of demonstrated experience providing application
system development, operations and maintenance,
support service to public sector defined benefit and
pension industry clients." And then, "Experience with
application functions similar to those performed by
the agency, in particular but not exclusively, those
included in the MPAS system," which is described
rather in detail in this.

I think that's explicit, but if there are
any questions about that, we'll take them later.

In terms of the personnel minimum
qualifications, "Only those master contractors
supplying proposed key personnel that fully meet all
minimum qualification criteria shall be eligible for
evaluation. The offeror shall propose exactly three
key personnel, including two senior computer
programmers and one senior internet or intranet site developer." That is a DOIT requirement. That -- you have to propose exactly three key personnel.

The concept is that if it's key personnel, we can look -- it's hard to substitute. Therefore, those credentials count in an evaluation. If people are submitted to us that are not key personnel, the Department of IT basically says, "Well, they could substitute that any time they feel like it. Therefore, don't count it." So this is basically coming from Annapolis to us.

We want you to note that one of the reasons we do have the offeror minimum qualification that it have -- you have some industry experience is that we expect when new people come on board that there will be some way to get those people oriented to our industry, that we won't have to do an orientation program every time someone new comes on board. We would like, you know, we expect assistance in that process when people come on board.
And following up on that, on page 15, toward the top, "It's strongly desired that the task order contractor's collective team personnel possess a balance of both business and technical experience," and "specific strongly desired experience for personnel are --," and then that's all listed. Okay?

But we are looking for a balance. We don't want someone who just knows how to program. That's not what this is about. There is a business analyst aspect of it, and we hope to, you know -- that's different from previous contracts that we've had.

For the senior computer programmer position, looking at the paragraph toward the end, it says, "In addition, it is strongly desired" -- that is not required, it is strongly desired -- "that proposed senior computer programmer personnel have a minimum of two years experience working with public defined benefit pension systems in addition to the requisite technical skills. This industry specific experience will be given additional weight in considering and
1 comparing the master contractors' proposals."
2 And then looking, then, toward the senior
3 computer systems analyst, "A minimum of two years
4 experience performing business analysis, requirements
5 analysis, and testing services on information systems
6 that support core pension administration functions of
7 a public sector defined benefit program," and that we
8 describe that in Section 3.
9
10 This agency does not have sufficient numbers
11 of business analysts to handle the reengineering of
12 our applications and business operations, so we
13 included these resources in this task order RFP. All
14 future technical requirements will be issued by the
15 agency. And I want to make this clear, that
16 this agency sets its own requirements, that the
17 business analysts are not going to be solely
18 developing requirements that will then be put out for
19 bid. Okay? The state does not like that. We're not
20 intending to do that.

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but we do need help on testing, and we do need help fleshing things out and that's why we are having that. But irrespective, then, of any involvement of the business analyst in coming up with ideas or doing testing or things like that, the agency will put out requirements.

We also want to note that the overall direction of technology here will be mostly influenced by the business process reengineering consultant working with the agency personnel. And more about that shortly.

Skipping ahead to page 19, "Scope of Work."

As Margie said before, we are going to make exactly two CATS Master Contract awards that can respond to the work orders that we wish you to fulfill, and that's because of the two factors listed here.

One is "Need to provide adequate numbers of personnel with appropriate industry experience, given the few number of public pension plan administrators within the state for whom systems development support
could be even contracted in the first place."

And then the requirement to "Periodically and expeditiously expand the number of required personnel given the agency's plans during the proposed contract duration," which are described in the RFP, "to address a broad range of assignments to be issued as work orders under the RFP."

This procurement represents a replacement of two current contract vehicles. One is for MPAS, the Maryland Pension Administration System, MPAS operations and maintenance. And the other is currently geared towards other applications.

Looking into the near future, what we saw are two scopes of work that are increasingly becoming one scope of work because the number of differences between MPAS and other systems, particularly as we look to integrate those systems together more and more, that line of demarcation between MPAS and other systems is largely going away.

And we do not want to find ourselves
constrained by having one contract focus on this, one
contract focus on that. We are looking, definitely,
to integrate our applications.

A little bit further on, it says that,
"During the prospective task order period of
performance, Agency plans to implement "significant
changes in business operations involving modifications
and enhancements through associated pension
administration and financial applications in addition
to acquiring and integrating commercial off-the-shelf
applications into business workflows. Those
modifications will occur in parallel with daily agency
operations."

The task order involved here is much more
than operations and maintenance on existing
applications. Far more than that. Okay? We want to
make that very clear up front.

I would make one correction on page 20.
It's been a good year for this agency. The value of
the assets in our system is now over $51 billion.
Skipping ahead to page 23, the MPAS strategy. I am not going to read this out loud, but I do suggest you read it. The current task order RFP is part of a 12-year-old consistent strategy that we've had at this agency, which this agency has methodically gone about executing. And we have now reached the point where this RFP -- it's time.

Looking toward the next page, page 24, fourth line down. "The agency submitted a major information technology development project or MITDP," in state parlance, "to the State's Department of Information Technology which in turn reports the plan to the General Assembly. Its formal title is," and this is the MITDP's title, "Business Process Reengineering and Supporting Technology," and it consists of three things. One is modifying many existing batch MPAS transactions to be on-line real-time update. We have had this in the works for a long time, in our thoughts for a long time.

Secondly, "re-engineering business
processes in the retirement administration and finance
divisions related to pension administration
activities." We want to note that the consulting
contract was approved by the Board of Public Works in
its meeting early this month to LRWL, and that
includes overall project management for up to four
years in addition to business process reengineering.

So as we see this, there will be management
of the various activities from the agency. There will
be an overall project manager that will come from the
business process reengineering consulting
organization, and then there will be individual task
orders that will, perhaps, have team-leads and so on
assigned from within these two contract awards that
we're talking about today.

And the third aspect of the MITDP is
"Acquiring and implementing supporting technologies,
such as workflow management, member relationship
management, and document management products, and
integrating those new technologies with existing
agency voice and data technologies which are currently mostly stand-alone."

We have a -- for example, an interactive voice response system that does take a download from MPAS, but there's no transactions conducted as a result of it. You can listen to something. That's fine, but nothing goes back. We hope to change that moving forward.

Same with workflow. Right now, there's no formal workflow tool in the agency. Customer relationship management is handled in various pieces, but not looking at it from some kind of a consolidated global perspective from us vis-a-vis our customers, our members. So that's all part of it.

Skipping ahead to page 28, the bottom of the page. "The agency intends to assign or issue work orders to one of the two task order contractors," or for that matter to two of them, "according to work order processes described in the RFP. Making assignments, the agency will work with task order
contractors as much as practical to sequence the assignments to provide consistent staffing by personnel already working on applications."

We know this is an issue. If you have someone here, we don't want to find ourselves with that person not having something to do for one month, and then you're trying to bid them on something coming on the heels of it a month later. We don't want to do that.

We're -- we believe that trying to take this kind of an approach will work to everyone's benefit, and we're explicit so that you and your staff can know that continuity is important to this agency. We don't want your people to feel as if the ground is constantly rumbling under their feet because their current task order is coming to a conclusion. So we will work with contractors in that regard to try to bring as much consistency to the staffing as we can get.

Skipping ahead to page 33, let's talk about
work orders. We put a listing of potential work orders to be prospectively issued under the task order agreement as examples. It's not a complete list, nor does it represent a commitment on the agency's part to issue any of the orders that are listed here, but we're trying to give you a sense of what we have in mind.

We don't see a work order as a two-week kind of thing. We see that as more -- bigger issues for longer periods of time. That doesn't mean we won't have one that's two weeks, but that's not the way our mind set is working for this.

The work order process is -- compared to many of these kinds of contracts, this is really a major component of this procurement. And strategically, it's important to this agency that both task order awardees get a good balance of work. We want to be explicit in that.

Strategically, we want both of the contractors who get awards here to get lots of work,
and there's plenty of work to go around if you look at what it is we have to accomplish.

Again, we're trying to, you know, work this in a way that people don't get nervous about it, and don't, you know, try to -- and see it as a collaborative effort that we will have between ourselves and the awardees to the extent that we have work to do.

Looking to page 37, dealing with 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."

I'm not going to read them, but please pay attention to this. We don't want you to jeopardize contract award simply because you didn't read this stuff.

Okay? So I do call your attention to it.

Page 39. This is one I normally don't even mention, but I'm going to mention it at this point.

And that is "work space, work stations, network
connectivity, and software. The agency will provide all necessary office space, network connectivity, and required work station hardware/software necessary to complete the requirements of this task order."

I want to make a note that, you know, it may take a little coordination depending on the pattern of state funding of the MITDP. We could find ourselves with a lot coming all at once. We could find the state funding it more incrementally. And what we don't want to do is find ourselves having to start something very quickly, and have a lot of space, and a lot of PCs.

We want to, at least, make it known that we recognize that there are some logistics in this, and depending on how the funding works, we're asking you to work with us on it. This is certainly our intent, is to do what's here in the RFP. But, you know, if you will cut us a little slack if we, you know, miss it by a little bit, we'd appreciate it.

The work order process itself is described
in Section 3.9. I presume you've read this over, and
I'm not going to read it over. I want to make a
couple of points here. On page 41, in G, "Selection
will be made based upon which task order contractor
proposal is most advantageous to the agency. An
additional consideration when determining which
respondent is most advantageous is that technical
factors will be given greater weight than cost."
Generally, criteria used to make the
determination or preference are listed here. Okay?
Generally. The circumstances need to be flexible on
this, which is why this was written the way it is.
You will want the flexibility. We will want the
flexibility. Okay?
We don't want to make it so that there's
absolutely no possible alternatives here other than,
for example, you know, price or something like that.
That's not our intention here. And we hope you will
understand that the agency and the Department of IT
worked really hard on this to come up with this with
the aim of being fair and pragmatic.

There's a lot to get done over the term of this contract, and this is the best mechanism we had in order to get it done. Okay? You may have questions about it. I'll take them later.


All I'm going to say is that the proposal format is part of the Department of IT boiler plate. Please pay attention to it. I'm going to -- I've already been told at least one question is going to come about this. Fine. Ask it later. Okay? We'll do our best to give you the best answer we can.

I want to jump to page 53, which is the task order award process. Looking at Section 5.2. "The task order technical proposal must clearly substantiate," and I underlined the word in my book, "substantiate that the task order contractor fully meets minimum qualifications of this RFP." Okay? Please be explicit.

Be aware that the -- according to state
rules, you can't provide additional information later, only to clarify information you already provided. If you have a credential you want to mention, please put it in the proposal. We can't be mind readers, but you also can't add it later. If you forget something, you can't add it later. Get it all up front. We do want to know. Okay?

B. "In part we will evaluate you on the quality and accuracy of the technical proposal." Not only in terms of format, but also the quality of it. Okay? We will draw conclusions about your ability to do documentation based on the technical proposal and how it looks and reads.

One would hope I wouldn't have to say that. I find that I do. Okay? Please proofread. Please look at the thing more than once. I will leave it at that.

C. "Capability will be determined from each proposed individual's resume, reference checks, and oral presentation." And this relates also to the oral
1 presentation itself and key personnel. This agency
2 will expect to see and hear from all key personnel at
3 the oral presentation if you're invited to present.
4 Okay? We say that right up front.
5
6 MS. GORDON: In person.
7
8 MR. GREENSTEIN: Hum?
9
10 MS. GORDON: In person.
11
12 MR. GREENSTEIN: In person, yes. Okay?
13
14 A little further down, "Greater weight will
15 be given to key personnel who have experience with the
16 core pension administration functions of a public
17 sector defined benefit program as described in Section
18 3 of the task order RFP." Typo. We can't fix this.
19
20 At the bottom of that page, there is a
21 cross-reference chart. Please include the cross-
22 reference chart. It is not normally asked for, but
23 because we have people who may be in a certain labor
24 category, or who it may not be clear you're bidding in
25 one labor category or another, it will help us to
26 understand this person -- because people have
27 overlapping credentials.
If you want to bid someone as a web
developer category, fine. Just tell us who. You want
to bid them as a senior programmer? Fine. Tell us
who. Okay?

Looking at the top of page 54. "In
evaluating the quality and accuracy of each
individual's resume, the agency will assess the extent
to which the offeror can attest to the proposed
personnel's respective qualifications and experience,
based on direct observation of those individuals'
work." As opposed to pulling resumes of people that
you have no idea who they are off of the internet, and
calling them up, and talking to them, and saying,
"Gee, this person sound like they can put two and two
together."

We will give people -- give proposals
greater weight if we know that you actually know who
these people are. And I speak this from experience
here at the agency, there have been times where people
are shaking hands at orals, meeting each other. We
prefer that that not be the case.
And finally, on page 57, this is the price sheet. "Total Class Hours," which is Column B, "are not to be construed as guaranteed hours. The total number of hours is an estimate only for the purpose of price sheet evaluation."

Because this does not have a fixed scope of work, we have to come up with some way of comparing apples to apples. So we've done our best to, sort of, give what balance of different labor types might be included, but it's not a commitment on this agency's part. Okay?

And with that, do we want to get into questions?

MS. GORDON: Let me go into the --

MR. GREENSTEIN: Okay.

MS. GORDON: -- submissions.

I'm going to go back into Section 4.2 where the proposal submissions, and for those that are sending their submissions by e-mail -- that we would like that to be the case, but if you are going to do a hard copy, that's fine too.
But for every submission, please read over 4.2.1, specifically the password protected attachments. You'll have one password protected attachment labeled the TORFP, the number, technical proposal. Prefer it in Microsoft Word format of 2007 or later.

We will -- I will then contact each vendor, offeror, to get their password in order to open these proposals. The same thing, you would do a separate e-mail for the task order financial, and it will be password protected, and then once we do all the evaluations, the orals, then I will call those that have passed on through to request their passwords to open up the financials.

And I'm going to say, if you do not do this correctly and you do not password protect your documents, that can be determined as being not sufficient for susceptible for award. So I'm just going to give you that little tidbit of information.

And for those that prefer paper submission, as I said, call me and I will give you the
instructions for that.

But other than that -- and the next thing we will go to is the summary of attachments, and page 56 of the TORFP will give you a list of attachments and what you need to do with -- for them. It might be submit, do not submit, doesn't apply, but that will help you as far as what you need to submit when -- and when you need to submit.

And other than that, I'm going to ask for questions. We do have some questions that came in that I'll go over, and I think we've already -- some of them we've already answered, but I will go over them.

Question, "Can we substitute our experience with any public sector entity, not pension industry, like Department of Labor/Health, Child Support, et cetera?"

MR. GREENSTEIN: No.

MS. GORDON: Second question is "Can we use our consultant experience in pension industry instead of the company's, at least as in the min quals it's at
least two years of demonstrated experience providing
application systems development, operations, and
maintenance support services to public sector defined
benefit/pension industry clients?"

MR. GREENSTEIN: We'll think about it.

Certainly, I mean, up front, we'd have to say it would
have to be key personnel, if we accept it. There are
separate qualifications for company versus personnel,
and if we basically mix the two and allow them to
overlap, I'm not sure what the implications would be
for us from an operating point of view. And
therefore, we'll get the answer back to you guys in
writing.

MS. GORDON: Okay. Third question, "Is this
a fixed bid or time and material project?"

MR. GREENSTEIN: Yes. As I said, it is time
and material as a baseline block, but there may be
components of it which will be -- it will make sense
to do in a fixed price basis.

MS. GORDON: Question four is almost exactly
the same as question number two. "Regarding the
contractor's minimum qualifications in Section 2.1.1, is the proposal to clarify the CATS+ contract holder's experience with application systems development, or our proposed candidates' experience?"

MR. GREENSTEIN: Section 2.1.1 says, "Offeror," and in that sense, it is for the offeror. There are subsequent sections for personnel, and we will get back in terms of how the two relate to each other.

MS. GORDON: Question number five is "Can we use subcontractor's experience in public sector defined benefit/pension industry?"

MR. GREENSTEIN: According to the rules we are given by the Department of Information Technology, you cannot substitute a subcontractor's experience or use the subcontractor's experience to meet the qualifications of an offeror. However, it would certainly supplement them in terms of the evaluation of the proposals.

MS. GORDON: Okay. Question number six. "Are subcontractors supposed to be a CATS master
contract holder, or only prime being CATS master contractor would suffice?"

MR. GREENSTEIN: This one's you.

MS. GORDON: Okay. The CATS master contractor must be a prime. The subcontractor -- you can subcontract outside of the CATS master contract, but the prime needs to be a CATS master contractor.

Number seven. "If a prime -- if prime is a certified MBE, do we still need to get an MBE subcontractor to meet 30 percent of the MBE participation goal?"

Primes are only allowed to fill 50 percent of the MBE goal. As I said, the other 50 percent must be a subcontractor. So 15 percent can be the prime MBE, 15 percent be the subcontractor.

"Do the prime needs" --

MR. GREENSTEIN: Yes.

MS. GORDON: "Do the prime needs to have experience in public sector defined benefit/pension industry?" Yes.

MR. GREENSTEIN: Read the RFP, subject to
what we said before.

MS. GORDON: And now, do you have any further questions? And if you do, please say your name and the company you are with, please.

MS. TIMMONS: Amy Timmons, DXC Technology.

On page 49, Section 4.4.1, -- 82, if you want to get really picky, I talked about -- and this is really semantic, but I talked about proposals and wanting to respond to Section 3 in the order of Section 3. Do you -- are you looking for a point-by-point response to all of Section 3, or particular areas, or we can, kind of, group it all together?

MR. GREENSTEIN: I'm going to make an executive decision here that you can group it together, as long as you cover what's applicable. Again, you can't add credentials later.

You can clarify what credentials you have submitted, but if it puts anything new out there later on as -- in response to a question that we may pose for a cure letter for an orals, we can't -- we have to ignore anything new. And so, it gets back to as -- I
would keep it in -- within the section. Okay?

But do you have to go point for point for point going through the thing, and I would say no, as long as it's there. I -- we want it to have some kind of a logical flow. It is really hard to read some of the proposals we've gotten back, and I'm, you know, quite serious about that because of the language that's here.

We do want this to be a readable proposal that you submit. To the extent that you can make it that way, we would appreciate it, but cover the content. Okay? And keep it by section.

MR. KORICKI: Val Koricki, DXC Technology.

We understand that the dominant place of performance is in this building here. Will the agency entertain allowing some of the resources to work in some of our company locations within the U.S., but outside of this Baltimore area?

MR. GREENSTEIN: Our preference has been, and will continue to be, that it be here. We have made exceptions to that in the past, and I presume...
since we can't anticipate the content of every single work order that is coming out that there may be circumstances where we would be -- tell me if you disagree with me, guys. All right? We can give you an answer now, or we can give you an answer -- I think, you know, our preference would be for it to be here.

We have, you know, depending on what makes sense, we may be flexible later, but that's not our initial intent. We do not want off-shoring, either to somewhere on our shores or off our shores. That's not what we're looking for. We're actually looking for people that will be here, that we can interact with easily on a day-to-day basis, that can come to meetings as we need it, and so on, to clarify things. That's what we are used to, and that is what our thought process is for this.

MR. KORICKI: Okay.

MR. WOLF: Tom Wolf, ISSI. You talk about the possibility that this could ramp up to 25 -- a total of 25 people. Do you have any expectation of
the time frame for that ramping up? And especially in Year 1, where you're asking us to price six different labor categories, but you're only going to give us three to begin with. Any idea of how long, how soon, it will ramp up beyond that?

MR. GREENSTEIN: I'm going to take exception to the last part of what you said, that you only -- we've only asked for two, three people to start with. That's not correct.

We've asked -- we are required to ask for exactly three resumes. That does not mean that we're going to start this off with exactly three people.

MR. WOLF: Okay.

MR. GREENSTEIN: Okay? It's just that we can only ask for three resumes.

MR. WOLF: Okay.

MR. GREENSTEIN: Is that -- I think that is a fair statement. We might very well ask for more. I can easily see the circumstance where between the two contracts we might start this thing off with seven to ten people. It would not be inconceivable to me that
something like that could happen.

And I think it is fair to say that a lot of the pacing of how fast we ask for staff, and how many we ask for, is going to depend on the funding of the major work that we have going forward. We have funding for the current fiscal year, and we have requested significant funding for next fiscal year.

That is -- it is making its way, right now, through the budget process, but the ramp up time, and exactly what skills, and all of that will be partially gated based upon the funding base that we get.

MR. WOLF:  Okay.

MR. GREENSTEIN:  Our inclination here is to go more, faster. Okay? We have been waiting 12 years to get this thing going, and some of you guys have been with us for all 12 of that, looking at the frustration that we've had all along. So we'll -- I can't tell you for sure.

MR. WOLF:  Sure.

MR. GREENSTEIN:  I don't think anyone can tell you for sure right now, but that's where our
heads are at. But don't assume that because we're asking for three, therefore it's going to be three. From three, or three and three, or whatever.

I would -- the number three, we went back and forth with Annapolis on that, and Annapolis felt that it was fair to put three in there because of the nature of the key personnel. They did not want to handcuff the offeror by making you commit a large number of people, but there's also -- we have to be able to evaluate some credentials. And so this was where the compromise was, but that does not bear any direct relationship to how much work there is short-term, long-term, or anything else. Is that clear?

MR. WOLF: Yes, and as a follow-on, the 25 number that you used, could that be per award, or could that be a -- or is that a total? What were you thinking on that?

MR. GREENSTEIN: It's allowable to be per award.

MR. WOLF: Okay.

MR. GREENSTEIN: Do I think it will be?
UNKNOWN SPEAKER: Maybe.

MR. GREENSTEIN: Again, it gets back to what's being funded and how fast it's being funded.

MR. WOLF: Okay.

MR. GREENSTEIN: I -- it's more likely that that's between two. Okay?

But we have found ourselves in the existing contract, which we said for one contract you could have up to seven people in one of the existing contracts, and the other said you can go up to five. We have 12 right now. Okay? And we are constrained, and we did not want that to be the case on ones moving forward.

So I can't build an expectation, but I also don't want to, you know, the same as we don't want to put handcuffs on you, we don't want to put handcuffs on us. Again, we're trying to be as fair and pragmatic as we can be given, you know, what we know and what we don't.

Did that answer your question?

MR. WOLF: Yes, thank you.
MR. GREENSTEIN: You're very welcome.

MR. ATHREYA: Narayan Athreya from ICube Systems. You have three key personnel and two awardees in this. Could you award all three key personnel to one company, or you're going -- thinking of splitting by picking the best of the three -- best of the six?

MR. GREENSTEIN: Each -- for the proposal -- again, separate the proposal process from the work order award process. Okay? You must submit exactly three key personnel in the proposal, but how that relates to the work orders that will be issued is, you know, subsequent to the awards is a separate process.

We could go three and three. We could go one and two. We could go two and two. We could go five and seven. We can go -- you know? We don't -- again, don't -- the proposal process is what we have to go through, but the award process on work orders is not the same.

And if you look at the work orders that are here, some of them you would look at and say, "Well,
yeah, they better be doing that." You know, like running our existing pension administration system. Currently, the contractor running our pension administration system has four to five people doing nothing but that. Nothing but that.

No enhancements, no anything, and it's been that way for many, many years. Well, that's more than three. So we know right off the bat that the constraint of three, just on the one work order, is going to be exceeded. And this is the way we have to go about structuring this, but, you know, work with us. You know, on filling out the work we actually need done.

MR. ATHREYA: Sure. Thank you. I have one more. It's more a request than a question. You said the company minimum qualifications, you can use only the prime's quals, and on couple of q-order (phonetic) is -- that is out there, they have changed, amended, the TORFP to include that they would consider both the prime and the subcontractor's qualification for this, and that is allowed by DOIT. So I request that the
agency can revisit and clarify with them.

MR. GREENSTEIN: Okay.

MR. ATHREYA: Thank you.

MR. GREENSTEIN: We will do that and get back to you. That was strictly what we got coming to us. Okay? And it was emphasized, coming to us.

So if the Department of IT allows flexibility on that, then I would assume that we would also follow suit on that, but let us check with them, and we will then determine. Even if they do, we might decide we don't, but let us at least check. You got that one?

MS. GORDON: Uh-huh. Yes?

MR. WAINWRIGHT: Department of IT, also --

MS. GORDON: Your name?

MR. WAINWRIGHT: Oh, Mark Wainwright, also with ISSI. We are -- Maryland DOIT has stated that agile is the preferred methodology for software development. Is that -- where is the retirement agency in terms of using agile and things like DevOps in your IT infrastructure?
MR. GREENSTEIN: Want me to take that one?

Most of the work this agency -- first of all, agile is questionable whether it makes sense for something like system maintenance.

MR. WAINWRIGHT: Uh-huh.

MR. GREENSTEIN: Development? Yes, but a lot of what we do here is small incremental changes, and to the extent that those exist, it's going to be a small group of, you know, maybe one person working on a particular change for a particular period of time. So the work may or may not be conducive to agile.

MR. WAINWRIGHT: Okay.

MR. GREENSTEIN: Or to a full-blown DevOps kind of mind set.

On the other hand, this agency -- whether you call it agile, or RAD, or JAD, or whatever, depending on what age you are, this agency historically has worked with small numbers of focused and intelligent teams in order to get things done. That has been what has enabled this agency to be as, what I feel, has been as successful as we've been in...
the systems development and maintenance area.

And I don't see whether we adopt a
particular methodology or not that it's going to
change what we're doing. In our minds, I think,
we've, sort of, been agile before agile caught on.

MR. WAINWRIGHT: Okay.

MR. GREENSTEIN: And it's certainly -- our
mind set is very much that way. Whether we structure
scrums and daily meetings, or weekly meetings, or
whatever, we've historically done, you know, weekly
updates on things.

When we did the pension reforms back in 2011
and '12, we got to the point where we were having
meetings every other day. Short meetings in the
morning to, sort of, say where is this thing at, and
what do we need in order to make everything work? So
before agile was agile, we were, sort of, doing it,
and I think we will probably continue the same kind of
way. It's a very natural thing here.

MR. WAINWRIGHT: Okay. And --

MR. GREENSTEIN: Anyone want to add anything
or?

MR. WAINWRIGHT: Well, as a follow-up to that, I mentioned DevOps, you mentioned DevOps. Is there -- do you have automation built into your technical infrastructure in terms of automated testing, CICD, automated deployments, things like -- of that nature already in your technical environment?

MR. GREENSTEIN: Want to take that one?

MR. MONTANYE: Sure. We have recently introduced some of that. I wouldn't say it's pervasive, but in some of the -- where it's appropriate where we have to do lots of scenario testing we started to do that. I think we certainly want to move in that direction.

MR. WAINWRIGHT: Okay.

MR. GREENSTEIN: We've used automated tools. When we had a circumstance where we were reverse engineering a system, and we had output from this system, output from that, and we needed to see was it working right, we used tools to do comparative.

MR. WAINWRIGHT: Uh-huh.
MR. GREENSTEIN: You know, comparator (phonetic), you know. We have a very disciplined approach -- or I would say approaches, to software version control and change management. That's been, you know, intrinsic to this agency all along, and depending on how you want to define DevOps, you know, this is whether that's part of it or not.

But I -- this is not a large -- we don't think of ourselves as a large development shop, and I think that that's enabled us to be successful up until now.

MR. WAINWRIGHT: Okay.

MR. GREENSTEIN: And we would continue to the extent we have.

MS. GORDON: Yes?

MR. HUSSEY: Leo Hussey with Computer Aid.

You mentioned tools. Page 49, proposal format mentions tools the master contractor owns and proposes.

MR. GREENSTEIN: Yes.

MR. HUSSEY: Is that part of the DOIT
template that you used, or --

MR. GREENSTEIN: Yes.

MR. HUSSEY: -- are you looking for specific tools?

MR. GREENSTEIN: Not necessarily.

MR. HUSSEY: Okay.

MR. GREENSTEIN: But if you have something good to suggest, we're fine with that. If you're used to working with something and it makes some sense, I would say we're open minded. Right?

We have at least two different sets of tools right now that -- one we inherited with the MPAS system and one that we use for other systems in terms of checking code in and out, and recording documentation. I'd hate to have three, but you know. I'd like to have one, but if there are things which you want to bring to the table, you know, we're open.

MS. GORDON: Yes?

MR. PATEL: Yeah, Praful Patel from OHM systems. Do you plan to award two contracts to two different company, or only one company can have award
as (indiscernible)?

MR. GREENSTEIN: There will be two contracts awarded, but on this task order.

MR. PATEL: Two different companies?

MR. GREENSTEIN: There will be two companies.

MR. PATEL: Two different companies?

MR. GREENSTEIN: Two different companies, and I'm not going to award two contracts to the same company. I don't know if that answers --

MR. PATEL: Yes, you did.

MR. GREENSTEIN: -- okay.

MR. NAZAIRE: Stanley Nazaire with Blue Sun Technologies. You mentioned earlier that you currently don't have a workflow, any workflow tools right now. And I'm just wondering, are you open to a third party, or are you expecting to develop that in-house?

MR. GREENSTEIN: We have SharePoint today. We do some workflow. I wouldn't call it amazing workflow, but we do have some workflow that works its
way through SharePoint Today. SharePoint is also used for our intranet, as I believe we talked about in the RFP.

I think we were thinking a heavier duty, kind of, tool set that is specifically geared to workflow. We do not have one in mind. However, we've talked about that as part of the business process reengineering for as long as I've been here, which is ten years, doing, you know, automating workflow.

We know there are tools out there. The tools today are better than they were ten years ago, as I'm sure in two years they will be better than they are today. And it is certainly -- to the extent that it makes sense, we would be putting it in.

The decision on that, as I see it, will be orchestrated by business process reengineering consultancy contract, but -- in conjunction with the agency. But the actual doing it, you know, putting it in and automating it, will be on the agency and that this task order RFP and the work orders that come from it will be, I would anticipate, directly involved in
doing it.

Yeah, go ahead.

MR. NAZAIRE: Let's say I (indiscernible) if we decide to go with a third-party, should we also include in the pricing this -- the support plan, cost that, you know, this software would require, or is this not acceptable?

MR. GREENSTEIN: Software acquisition is not part of this task order RFP. We will deal with that separately, and I think it's premature even to think about a product before we've had a chance to get the business process reengineering contract kicked into gear.

Right now, we are hoping to kick into gear early in January. So that, hopefully, within the first few months of that contract, we'll have some better idea of what kind of tools are out there, what kind of tools other public pension plans use, and what they do with them.

We are closely tied to the public pension industry and our peers in other states, and we do
regularly solicit input from them on what kinds of products they have, and what they're doing on it. In addition to which, there is a conference that is held annually that gets us all together and swaps notes about what we're doing, how we're doing it, and all that. A lot of it is break-out sessions on what people have done.

So that we -- I -- when I go there, I take lots of notes. Who's doing what, what products are they using, and so on, and therefore, it helps us to gauge what kinds of things are being implemented.

What other people have paid for them, and so on, and so forth.

Did I answer your question?

MR. NAZAIRE: Yes.

MR. GREENSTEIN: Okay.

MR. NAZAIRE: One last question.

MR. GREENSTEIN: Okay.

MR. NAZAIRE: All right. You had mentioned the platform that you use is SharePoint, where I guess, you -- collaboration, not full collaboration,
right?

MR. GREENSTEIN: Yeah, go ahead.

MR. NAZAIRE: I'm just wondering what kind of -- are you guys using it on-prem, or are you --

MR. GREENSTEIN: Yes.

MR. NAZAIRE: -- using --

MR. GREENSTEIN: It's on-prem.

MR. NAZAIRE: -- service -- or just on-prem?

MR. GREENSTEIN: It's on-prem.

MR. NAZAIRE: Okay.

MR. GREENSTEIN: We're using it -- and I think we went into how we're using it in the RFP. At least there were a number of examples of how we're using it. I thought we put that in here.

MR. MONTANYE: Uh-huh.

MR. GREENSTEIN: Yes, 3.3.9, that section.

There is, actually, workflow built into it. It's not the most amazing workflow maybe, but it's -- we use it, for example, for requesting supplies or office services. We use it for the request and approval process for motor pool and so on.
It also handles -- Form 42, right? Yeah, which is where member services gets a call. They need to refer it to more of an expert person. That person gets it, that person responds, that goes back into SharePoint and back to the original person who -- to who asked the question.

So we are using it for those kinds of purposes. Would I call it workflow software? I'm not sure Microsoft would. We have -- we've done a little bit of snooping to try to figure out what Microsoft is really strategically doing with this product, and I'm not sure that we've come to any specific conclusion.

But I don't -- we might use it, but then again, we might not. I know that a couple of other pension plans are using other tools, and I'm sure we will get some feedback from our reengineering consultants also on that.

MR. NAZAIRE: Thank you.

MS. GORDON: Yes?

MR. DEVENRAJ: Priyank Devenraj from OBXtek.

The question is, is there any infrastructure support
or within the scope of this RFP for hosting all the systems and things like that? Or is it purely something that (indiscernible)?

MR. GREENSTEIN: This RFP is for systems development and business analyst support services. Okay?

To the extent that this agency strategically decides not to host certain applications that we develop, or decides to host them, or whatever, that decision -- the decision to -- the staff to implement that solution, other than systems development and business analyst, is a separate issue. The product acquisition or the service acquisition is a separate issue.

MR. DEVENRAJ: Okay.

MR. GREENSTEIN: Okay?

MR. DEVENRAJ: One more question.

MS. GORDON: Okay.

MR. DEVENRAJ: So for the technical proposal format, is there, like, any page limit to the submission?
MS. GORDON: Just put it this way --

MR. GREENSTEIN: As short as you can make it to get the points that you want made.

MS. GORDON: And make sure that you include everything that you need to do because, --

MR. DEVENRAJ: Okay.

MS. GORDON: -- you know, as I said -- we said -- stated, you cannot put it in later.

MR. GREENSTEIN: You know, I wouldn't spend a ton of time repeating things. You know, you can refer to other sections. If you have one reference, for example, that hits on five different points, you can say, "Please refer to." And we can manage something like that. It gets very confusing reading very long ones that are repetitions. We will do it if we need to.

MS. GORDON: And I would like to make one request. Can we not include embedded documents within your document? We do have bit of issues with -- because all your documents that come through on e-mail, I have to print them off, and if I miss an
embedded one, it was like -- couple little pain there.

So if you would, please, include your
documents without putting them inside of the little
thing that you click on.

MR. GREENSTEIN: Icon.

MR. DEVENRAJ: Icon.

MS. GORDON: Yeah. Wait a minute.

MR. GREENSTEIN: I'm sorry.

MS. GORDON: This gentleman behind --

MR. HARJANI: Thank you. I'm Sandeep Harjani from Infojini, Inc. You mentioned that there
a couple of contractors who are currently supporting
the MPAS system?

MR. GREENSTEIN: One is supporting MPAS.

One focused other than MPAS.

MR. HARJANI: Oh, can you share the names of
them, please?

MR. GREENSTEIN: Sure. ADS is one, right?

MS. GORDON: Uh-huh.

MR. GREENSTEIN: And I'm not sure what ADS
stands for.
MR. WOLF: I'm sorry. ADX?

MS. GORDON: ADS.

MR. GREENSTEIN: ADS.

MR. WOLF: "S" as in sam.


MR. GREENSTEIN: Okay. Thank you. And the other is --

MS. GORDON: It's still with HP.

MR. GREENSTEIN: All right. With HP --

MS. GORDON: Slash --

MR. GREENSTEIN: -- state and local enterprise services, which has changed its name to DXC Technology, and I have no idea what DXC stands for.

Is that --

MS. TIMMONS: It's a secret.

MR. GREENSTEIN: It's a secret. Thank you.

We like vendors with secrets. But those are the two current contracts.

MR. HARJANI: Thank you.

UNKNOWN SPEAKER: (Indiscernible.)

UNKNOWN SPEAKER: I was going to ask the
same question, believe it or not.

    MS. GORDON:  All right.

    MR. GREENSTEIN:  I'll believe it.

    UNKNOWN SPEAKER:  Okay.

    MS. GORDON:  Any other questions?  Yes?

    MR. HUSSEY:  Hi, Leo Hussey with Computer Aid.  Page 2 lists the February 1st as the target start date, with proposals due January 16th, and having to go through the evaluation process --

    MR. GREENSTEIN:  Yes, yes, yes, yes, yes.

    MS. GORDON:  Yeah, we know, we know.

    MR. HUSSEY:  Can you give us a more realistic target start?

    MS. GORDON:  That all depends on -- one, say -- okay, as -- how many vendors' proposals we get, how many cures I have to send out.  Then once the cures are all done, then the evaluation comes into play.  Well, the evaluations come into play.  If there need to be clarifications done in between that, then that has to be done before we go into oral presentations.  Once the oral presentations are done, then
everything's evaluated, and then I go to opening your financials on those that are accepted. And then we go into requesting best and final offers. Once that's done --

MR. GREENSTEIN: All of this must approved, of course, --

MS. GORDON: Yes.

MR. GREENSTEIN: -- by the Department of IT as the control agency.

MS. GORDON: So you have --

MR. GREENSTEIN: Yeah.

MS. GORDON: -- it's a long process and yes, we were saying -- February 1st was just, kind of, a date.

MR. GREENSTEIN: Well, February 1st was a date when we didn't have an issue date. All right? We had this thing pretty much, we thought, ready to go four months back. And we -- and there was no point in really changing it because we, you know, honestly didn't know exactly how it was going to play out. And once the holidays started playing in,
well, that stretched the time frame a little bit more.
I would -- if I were guessing, it's probably April,
but we've been surprised in the past. I will say
this, and I've said it at other, you know, regarding
other contracts, too.

This agency has no incentive whatsoever to
hold up the evaluation. Is that a -- that is probably
the best thing I can say. We will move it forward as
fast as we can. We're not very bureaucratic about
that.

MS. GORDON: Yes?

MR. NAZAIRE: I understand how important the
lead candidates, you know, the resumes are to you
guys. But I just notice also that, you know, a lot of
the technologies that you mentioned, that it may
(indiscernible), if you don't have aversion as to
them. You know, like, SQL Server, Visual Studio.

What year are we talking about? Just to make sure we
have the right candidates for this.

MR. GREENSTEIN: We're largely current on
releases. So we're SQL Server 2015?
MR. NAZAIRE: Twelve?

MR. MONTANYE: We have 2016 and 2012 release

MR. GREENSTEIN: Okay. We're Windows, where

we're --

MR. MONTANYE: (Indiscernible) -- we're

latest and one behind with that --

MR. GREENSTEIN: Yeah.

MR. NAZAIRE: And Visual Studio?


MR. GREENSTEIN: And Team Foundation Server?

MR. MONTANYE: 2018 (indiscernible.)

MR. GREENSTEIN: Perforce may be the only

one where we're not at current release, I think.

Generally speaking, we try to be on, you know, at

or one behind. We've been pretty good about that. We

are mostly Windows 10 on the work stations. I think,

in fact, we're entirely Windows 10 at this point.

MS. GORDON: In your resumes, please make

sure that you put your month -- the month and year of

experience for each person, key personnel. You know,
we always get, "They've worked here," but we don't
know when. So --

MR. GREENSTEIN: Or they worked for this
company from this date to this date, this -- you know,
from 2010 to 2017, and they did these projects. Well,
that's great, but you know, how long were the
projects? You know, I mean if we have to
make a judgment about does someone have, for example,
two years of experience doing, you know, pension
administration core functions, and we can't deduce
from the resume whether it's two years or two days,
all we see is it's in a listing within a -- that
doesn't help us. So help us out so we get a sense of
it.

We have had issues related to people's
resumes that, you know, particularly where -- and I
don't think I'm speaking out of turn, where it looked
as if someone took a resume they got off a job board
and put it into, you know, put their letterhead on it
and put it -- and it's now submitted to us. And it
says, "I'm looking for this kind of job, and blah,
And we -- so it looks like it, but it also doesn't have any detail behind it. And it's impossible to evaluate a resume that doesn't have it. So if you're getting a resume from someone else, which we know some of you will, please make sure that their resumes also conform to that, where we really would like month and year.

MS. GORDON: Any other questions? Yes, Leo?

MR. HUSSEY: Hi. Is there an e-mail size limit that we should be aware of when we send the proposals to you?

MS. GORDON: Is it 25?

MR. GREENSTEIN: I think it's 20 or -- I think it's 20.

MS. GORDON: Megabyte?

MR. GREENSTEIN: Meg. If it gets to the point where you're hitting around there, please split the file in two. Okay?

MS. GORDON: If you have, like, your Technical Proposal, Part 1 and then Technical Proposal, Part 2, you can split it that way. And then
your attachments, all that you will need to submit with your proposal.

MR. HUSSEY: Okay.

MR. GREENSTEIN: Some people love graphics. You know, graphics, to the extent they don't relate to the credentials or the -- or whatever, doesn't get you any further. All it does is it takes up space on a page. We're substance people. We can get beyond that.

MS. GORDON: If you have any more questions that you think of after this, please submit them to the e-mail address procurement@sra.state.md.us. It's in the key information summary sheet, and I would like them no later than five days before the due date to give us any chance of answering them.

MR. GREENSTEIN: And we've stretched out the due date because of the holidays. It's the same as we stretched out, you know, the pre-bid conference today.

MS. GORDON: Okay? Thank you all for coming. We look forward to seeing your proposals submitted.
(Whereupon, the conference was adjourned.)
CERTIFICATE OF NOTARY

I, Chris Hofer, Notary Public, before whom the foregoing testimony was taken, do hereby certify that the witness was duly sworn by me; that said testimony is a true record of the testimony given by said witness; that I am neither counsel for, related to, nor employed by any of the parties to this action, nor financially or otherwise interested in the outcome of the action; and that the testimony was reduced to typewriting by me or under my direction.

This certification is expressly withdrawn upon the disassembly or photocopying of the foregoing transcript, including exhibits, unless disassembly or photocopying is done under the auspices of Hunt Reporting Company, and the signature and original seal is attached thereto.

CHRIS HOFER, Notary Public in and for the State of Maryland

My Commission Expires: