

PLEASE PRINT CLEARLY

**Maryland Department of Health**  
**TORFP – LTSS / ISAS Technical Infrastructure Support**  
**MDH/OPASS 20-18149 / M00B9400015**  
**Wednesday, August 7, 2019 @ 2 PM**

Name	Company Name Address	Phone Number	Fax Number	E-mail Address	Certified MBE	
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Name	Company Name Address	Phone Number	Fax Number	E-mail Address	Certified MBE	
					YES	NO
✓ Mike Curtis	Curtis Consulting 3104 Bunkards Ellicott City MD 21042	410-365- 2345	—	mike@curtis consultingcorp.com		✓
✓ Tom Gardner	MOSEY CONSULTING 17 GOVERNOR CT WINDSOR MILL 21244	410-215 3673		THOMAS.GARDNER @MOSEY-INC.COM		✓
✓ Bob White	6021 Linkersby Blvd Ellicott City MD 21043	443-831-4477		Bob.white@ IPdatasystem.com		
Bryan Hoffman	09 NOVEMBER DR CAMP HILL, PA	717-817 2271	—	BHOFFMAN@ TRECOMSYSTEMS.COM		✓
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✓ Abhay Nigam	Synergy Systems & services	443 610 3128		Abhay Nigam	✓	

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Name	Company Name Address	Phone Number	Fax Number	E-mail Address	Certified MBE	
					YES	NO
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Name	Company Name Address	Phone Number	Fax Number	E-mail Address	Certified MBE	
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**Pre-Proposal Conference Minutes**  
**Wednesday August 7, 2019 2:00 p.m. Local Time**  
**"TORFP – LTSS/ISAS Technical Infrastructure Support**  
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**DHMH Participants:**

- Queen Davis, MDH TO Procurement Officer – Office of Procurement and Support Services (OPASS)
- Eric Saber, Contract Monitor – Maryland Department of Health (MDH)
- Joseph Walburn - ISAS Division - MDH
- Priyanka Prasad - ISAS Division - MDH
- Joe Varacalle - DoIT Staff

**Attendees:**

- Sonia Rashid – Applied Technology Services
- Denise Desien - BDTI
- Tod Grantham – Biz Tech Fusion
- Tom Wolf – CITI
- Mike Curtis – Curtis Consulting LLC
- Eric W. Perlstein – EDWARDS Performance Solns
- Steve Edwards – EDWARDS Performance Solns
- Peter Arvey – Global Alliant
- Rajan Nataragan – Global Alliant
- Nora Presti – Group Z
- Pete Zairia – Group Z
- Narayan Athreya - ICUBE.
- Miriam Karumbo - ITnova
- Bob White – IP DataSystems
- Heather Johnson – JOVIAN CONCEPTS
- Thomas Gardner – MOSER Consulting
- Scott Surguy – SCD Information Technology
- Ashley Boykin – Serigor Inc
- Manu Bakshi – ServBeyond Solns
- Jody Sandwisch – ShoreIT
- Diedre Jefferies – STARKS Industries
- Tony Starks – STARKS Industries
- Sonia Kumar – STARKS Industries
- Deondre Brown – STARKS Industries
- Abhay Nigam – Synergy Systems & Services
- Laci Beall – Synergy Systems & Services
- Frank Taylor – TFC LLC
- Bryan Hoffman – TreCom Systems Group

**Procurement Overview:**

**Queen Davis, TO Procurement Officer**

MDH is issuing this CATS+ TORFP to obtain the services of a Task Order (TO) Contractor to provide technical infrastructure support and staffing for the Long-Term Services and Supports

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(LTSS)/In-Home Supports Assurance System (ISAS) project. The TO Contractor shall provide qualified skilled resources to provide system infrastructure oversight and technical support for the LTSS/ISAS system. The Master Contractor's team shall include a named Technical Project Manager. Additionally, the Master Contractor's team shall include one (1) Senior Network Support resource, one (1) Junior Network Support resource and one (1) System Application Analyst resource for a total of four (4) Key resources. Additional Senior and Junior Network Support resources shall be provided by the TO Contractor, as needed via Work Orders. In addition, other resources may be necessary to support the delivery of Work Orders (refer to TORFP Section 3.14). The four (4) Key resources shall be available as of the start date specified in the Notice To Proceed (NTP).

MDH intends to award this Task Order to the Offeror that proposes a team of resources and a Staffing Plan that can best satisfy the Task Order requirements. Offerors are advised that, should a solicitation or other competitive award be initiated as a result of activity or recommendations arising from this Task Order, the Offeror awarded this Task Order may not be eligible to compete if such activity constitutes assisting in the drafting of specifications, requirement, or design thereof. A Task Order award does not assure the TO Contractor that it will receive all State business under the Task Order.

The contract resulting from this solicitation will be in effect from Notice To Proceed (NTP) for three (3) base years with Two (2) additional one-year option terms. The Procurement Method used for this solicitation is Task Order Request For Proposal (TORFP).

**Section 2 – Scope of Work** - begins on page 8. Carefully review this section to get a full understanding of the requirements of this Task Order Request for Proposal.

**Section 3 – TO Contractor Requirements – General** - begins on page 26 Lists the initiation requirement from the kick-off meeting to fully transition to the new contract and information regarding the transitioning out at the end of service. This section also lists the roles and responsibilities of the personnel under this task order.

**Section 4 Lists** the TORFP Instructions including Award Basis, information regarding oral presentations and interviews should interviews be required. This section also lists the standard rules and requirements for this TORFP including information regarding additional Attachments related to this TORFP.

**Section 5 – TO Proposal Format** - Offerors are required to submit their responses to the TORFP in two parts. Section 5.2 – (beginning on page 50) clearly lists all submission requirements. The TO Proposal shall be submitted via two e-mails. Volume 1 – TO Technical Proposal and Volume II TO Financial Proposal.

**5.3 – TO Proposal Packaging and Delivery** instruction is clearly laid out in this section. Please read and follow instructions carefully.

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MDH can only accept e-mails that are less than or equal to 25 MB. If a submission exceeds this size, split the submission into two or more parts and include the appropriate part number in the subject (e.g., part 1 of 2) after the subject line information above.

The TO Technical Proposal shall be contained in one or more unencrypted e-mails, with two attachments. This e-mail shall include:

- Subject line “CATS+ TORFP # M00B9400015 & OPASS # 20-18149 Technical” plus the Master Contractor Name
- One attachment labeled “TORFP M00B9400015 & OPASS # 20-18149 Technical - Attachments” containing all Technical Proposal Attachments (see Section 5.4.2), signed and in PDF format.
- One attachment labeled “TORFP M00B9400015 & OPASS # 20-18149 Technical – Proposal” in Microsoft Word format (2007 or later).

**See Section 5.4 for complete instructions on your TO Technical Proposal email Submission. Please provide no pricing information in the Volume I Technical Proposal submission.**

The TO Financial Proposal shall be contained in one e-mail containing as attachments all submission documents detailed in section 5.5, with password protection. MDH will contact Offerors for the password to open each file. Each file shall be encrypted with the same password.

Subject line of the email submission shall read “CATS+ TORFP # M00B9400015 OPADD 20-18149 Financial” plus the Master Contractor Name

- One attachment labeled “TORFP M00B9400015 OPASS 20-18149 Financial” containing the Financial Proposal contents, signed and in PDF format.

**Section 6 – Evaluation and Selection Process** - The TO Contractor will be selected from among all eligible Master Contractors within the appropriate Functional Area responding to the CATS+ TORFP. In making the TO Agreement award determination, the TO Requesting Agency will consider all information submitted in accordance with Section 5.

**Section 6.4** - Explains the down select procedure, please read this section carefully.

**Section 6.5 Selection Procedures** - Please note letter F which states “The Procurement Officer shall make a determination recommending award of the TO to the responsible Offeror who has the TO Proposal determined to be the most advantageous to the State, considering price and the evaluation criteria set forth above. In making this selection, the TO Technical Proposal will be given greater weight than the TO Financial Proposal”

Commencement of work in response to this TO Agreement shall be initiated only upon issuance of a fully executed TO Agreement, a Non-Disclosure Agreement (To Contractor), a Purchase Order, and by a Notice to Proceed authorized by the TO Procurement Officer. See Attachment 7 - Notice to Proceed.

Please make note of the closing date and time for questions and proposal submission:

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<b>Questions Due Date and Time</b>	<b>Wednesday, September 11, 2019 4:00 PM Local Time</b>
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<b>Closing Date and Time:</b>	<b>Monday September 30, 2019 at 2:00 PM Local Time</b>
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**No proposals will be accepted that did not hit my email box after Monday September 30, 2019 at 2 PM.**

**Programmatic Overview:**

**Eric Saber, Contract Monitor**

**System Background and Purpose** - Approximately 7-8 years ago, Maryland Medicaid Provider Services began a project to create the LTSS/ISAS system to support Home and Community Based Services (HCBS). Through HCBS, Medicaid participants are able to receive services through Maryland Medicaid providers. Services supported by the system include personal care services, case management, nurse monitoring, and more. These services are designed to cover participant needs and improve quality of life at home and in the community as an alternative to receiving services in an institution such as a nursing home. The LTSS/ISAS system plays an integral role in ensuring services are provided and billed properly. As a result, Maryland Medicaid providers expect consistent functionality, particularly with respect to MMIS billing.

The LTSS/ISAS system currently serves 15,000-20,000 participants; however, the number of participants is expected to double within the next year. Since the system went live in 2012, there have been 40-50 releases integrating additional programs and functionality. This system is still actively developing; we project to have at least 5 more years of development. The largest population move will occur in the next year, and subsequent projects will be smaller but of equal importance.

We currently have one (1) contractor/vendor providing Software Development (FEi Systems) and one (1) contractor/vendor providing Operations and Maintenance (GANTECH). The recipient of this award will be working and collaborating with both of these vendors. Notably, there is a TORFP out for the Software Development contract. The recipient of this contract will assist with transitioning if there is a change in vendor for the Software Development contract.

**RFP Scope and Highlights** - The recipient of this contract will be responsible for ensuring that MDH is receiving its required product from our vendors. MDH will rely on the recipient of this contract to oversee progress and vet proposed and ongoing solutions on behalf of the State. The RFP requires 4 Key personnel for this award. These Key personnel are expected to be available on the date of award. The TO contractor is also expected to maintain a Production Datacenter and Technology lab. This datacenter will be used to assist MDH with future deployments, infrastructure changes, and software development for validation of proposals from vendors.



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Additional resources listed in Appendix 5 are not required for this contract but will be considered to assist with this project as needed. For instance, given the technical expertise required for these projects, MDH will need to leverage experts who are able to communicate information effectively to a layman audience including members of MDH itself. However, as far as official credentials, MDH will be evaluating those of the 4 Key personnel.

One responsibility of this contractor includes creating project management plans. We would expect this contractor to learn the process during the transition period and complete a plan on how they would do oversight. There are ongoing reporting tools that MDH expects about performance. These materials should readily explain technical details so that individuals at MDH can understand this information and use it to inform decisions.

This contractor would also be responsible for hosting and leading an architectural review board. Final decisions will come from MDH; however, for the most part, this contractor and its Technical Project Manager will independently oversee this process to ensure quality and efficiency.

The contractor would be part of the Work Order process, ensuring hours, solutions, and timelines are adequate, necessary and complete. We do expect 10-12 planned complex releases every year. Some of these releases may require full weekend and overnight hours, and MDH expects individuals integral to these efforts to be involved during the planning and delivery stage. In terms of releases, this vendor would be involved in general oversight and active troubleshooting. Furthermore, this contractor may have to be on-call to ensure successful release delivery and minimize delays. To review Work Orders and infrastructure activities, our current vendor uses ServiceNow as their system. As a representative from MDH, this vendor would be part of the authorization process as well. We would expect the project management plan to include how authorization will proceed. Because we expect very quick turnarounds for any immediate requests including emergency releases, this contractor would be involved in any related calls and planning. The contractor would also be expected to approve ServiceNow tickets to go into production, review anything that may impact project development, and participate in the general software development life cycle.

**Question and Answer Session:**

- 1) *Q: When will this Contract be awarded?*  
A: The award date is scheduled for March 1, 2020 with a 60-day transition period immediately preceding award of the Contract.
  
- 2) *Q: What is the turnaround time for questions? Is there a required format?*  
A: We will strive to answer questions as promptly as possible, aiming to compile and respond to questions at least by the end of each week. There is not a required format for

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question submission. The format provided summarizes each agenda item and answers specific questions asked during the conference.

3) *Q: Who is currently providing the services listed in this Contract?*

A: Curtis Consulting LLC is currently providing these services.

4) *Q: How many resources support the Contract today?*

A: Currently, 6-7 resources support the Contract, including the four (4) aforementioned Key resources and a few additional roles. A few of these roles are part-time. The hours listed in the provided materials should reflect this. A few of the additional roles list various hours, but we do not expect some these roles to be full-time.

The TORFP is not explicit in the CATS+ labor category. The technical proposal will be reviewed based on your proposed labor categories, your understanding of the needs of the program, and the resources you offer to provide.

5) *Q: Do you have on-time support within the 7 supporting resources today?*

A: The TORFP has not explicitly outlined all resources that may be required. However, MDH has identified a few areas listed in Appendix 5 that may be particularly useful. Should MDH determine that additional support is needed, a relevant Task Order will be placed. MDH would rely on the recipient of this contract to post candidates for these roles who would then be interviewed and accepted by MDH.

6) *Q: Is there a clear handoff from Software development shop to Operations and Maintenance development shop once we go live?*

A: Yes, this handoff is an agreed-on process between the Software and O&M vendors with oversight from this TO Contractor. There will be a mutual understanding on the package submitted from the Software Development vendor to the O&M vendor, the associated timeline, and the minute-by-minute release schedule for the length of the release period (release schedule varies but will require overnights and weekends), including any associated validation testing. There is a current system in place, and we would expect this vendor to support that going forward.

7) *Q: Can the current TO Contractor, Curtis Consulting LLC, reapply?*

A: Yes.

8) *Q: How will this vendor be involved in software development?*

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A: This vendor will not play a part in the software development RFP. However, we expect to award this contract prior to the software development contract. Thus, this TO contractor will be expected to assist with the software development vendor transition beginning 4 months prior to the software development contract award date.

The System Application Analyst position will be involved in the software development process, assisting with oversight of the Software Development contractor's work.

- 9) *Q: When do you expect the interview process to start? If you select someone and they are not available seven months later, how do you plan to handle that?*

A: Once we have received all proposals, we will schedule interviews for November or December within 30-45 days of the final date of submission. If the selected contractor is unavailable, then they will be disqualified. Substitution of personnel will not be permitted until after award.

- 10) *Q: I cannot find the Key resources in the original CATS+ document in Section 2.10. How should I proceed?*

A: When proposing the CATS+ labor category, it is advisable to stay in line with the Key resource needs identified by the department in the TORFP section 2.10 and the optional resources in Appendix 5. Part of our expectation will be for you to list out the labor categories that you expect will best align. This will help us evaluate whether potential vendors understand the process and the Key personnel we are looking for.

- 11) *Q: Will incumbent O&M contractors have an opportunity to submit proposals in response to this procurement?*

A: The incumbent O&M contractor is GANTECH, Inc. No, GANTECH will not have the opportunity to submit proposals, as this is a Small Business Reserve (SBR) procurement. Additionally, one of the roles of the Technical Oversight Contractor is to oversee and advise on the O&M vendor's work. If the O&M contractor were to bid, this would represent a conflict with these duties.

- 12) *Q: Does the Offeror have to be a CATS+ prime contractor as well?*

A: The Offeror has to follow the CATS+ Contract Method. This TORFP is SBR-only, so master contractors listed as SBRs on the CATS+ site will receive the TORFP. The vendor is required to be an SBR vendor at the time of submission but may graduate afterwards.

- 13) *Q: Is the first time the offer has gone out for re-compete?*

A: Yes.

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14) *Q: For the disaster recovery center, is there a specific radius for the primary?*

A: The disaster recovery center refers to the O&M GANTECH contract. That is not a requirement for this contract since this vendor will not be storing a production environment for Protected Health Information (PHI). This is not an Operations and Maintenance Contract. This Contractor will not provide a production environment for the LTSS system. The Production Data Center provided by this Contractor will only serve in an oversight and staging capacity.

15) *Q: Regarding Section 3.10.2: Can items B and C (Healthcare Management Systems supporting 2,500 or more end-users and specific claims processing management or oversight experience) be addressed by our proposed subcontracting partner?*

A: Yes, a subcontractor may be used to meet this requirement. All positions and requirements, including named Key resources, may be met by a subcontractor of the Offeror.

16) *Q: Regarding Section 3.10.3 - Personnel Experience: Can the specialized experience requirements for the Technical Project Manager (Experience with HIPAA compliant EDI files, and 2 years in healthcare claims processing oversight and management) be substituted with "Health care IT" experience?*

A: This TORFP does not set minimum qualifications for the Key Resources. If a resource is missing specialized experience, such as "Experience with HIPAA compliant EDI files, and 2 years in healthcare claims processing oversight and management," they will not be automatically disqualified from consideration. The Department will use the evaluation of the overall quality of all proposed resources based on the submitted resumes to make a judgement on Offerors' technical evaluations.

*In regards to Section 2.3.2 TO Contractor Personnel Duties and Responsibilities, for requirement 2.3.2.25 items A-F, for Production Datacenter and Technology Lab:*

17) *Q: What necessitates the Production Datacenter and Technology Lab as a requirement?*

A: The lab is used for infrastructure builds for release testing. Depending on the implementation, we will need additional help to validate what the O&M vendor provides; the lab would assist with this function. The Production Datacenter and Technology Lab must be located within a 30-mile radius of the Department Headquarters. The Technology Lab must be identified by the time Technical Proposals are due, as part of the evaluation will involve a site visit to the Technology Lab. However, the Technology Lab will only have to be operational for MDH, with MDH's code base, within 90 calendar days from the Notice to Proceed.

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*18) Q: Is this Production Datacenter and Technology Lab currently in place? Might we be able to view the current facility?*

A: Yes, there is a Production Datacenter and Technology Lab currently in place. No, potential Offerors are not able to view the facilities.

*19) Q: Can the Offeror use the facilities of a proposed subcontracting partner to supply these facilities?*

A: Yes, the Offeror may propose a subcontractor to supply the Production Datacenter and Technology Lab Facilities.

*20) Q: Can some of the production and/or lab infrastructure be in a cloud environment (AWS or Azure)?*

A: The current production environment through the O&M contract is not in an AWS or Azure cloud-based environment and this vendor must be able to support proof of concept for the current infrastructure. However, a future infrastructure change to a cloud environment is possible and may be required as a proof of concept.

*21) Q: Will MDH provide the necessary software to replicate the production environment?*

A: The Contractor will work with the Software Development and Operations and Maintenance contractors in order to replicate the LTSS code base and technical specifications. Any software or hardware required to stand up the datacenter will need to be provided by the Contractor.