STATE OF MARYLAND
DEPARTMENT OF LABOR, LICENSING AND REGULATION

Pre-Proposal Conference
Consulting and Technical Services
Task Order Request for Proposals
Vermont, Maryland and West Virginia (VMW)
UI Modernization (UIM)
Project Management Office (PMO)

DLLR-FY-2015-005-004, P00B5400010

1100 North Eutaw Street
Fifth Floor
Baltimore, Maryland

August 8, 2014

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SANDY CRISAFULLI, Procurement Officer
DENNIS MORTON, Deputy Assistant Secretary for
Unemployment Insurance
MELISSA GANLEY, VMW Project Director
GLENN GODWIN, Project Manager for Maryland
MONIQUE SMITH, Assistant to the Program Director

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PROCEEDINGS

(9:30 a.m.)

MS. CRISAFULLI: Welcome to the Department of Labor, Licensing and Regulation. I'm Sandy Crisafulli, the Procurement Officer for Consulting and Technical Services Task Order Request for Proposals, Vermont, Maryland and West Virginia, UI Modernization PMO, DLLR-FY-2015-005 [sic], P00B5400010. I'm going to be the sole point of contact for this procurement. At this time I would like everyone to please sign in on the sign-in sheet and place your business cards in the brown envelope, if you haven't done that already. Today is August 8th. It is 9:30. This Pre-proposal Conference is being recorded to ensure compliance with the State of Maryland, COMAR Title 21.

When asking questions, it's important to identify yourself, including your company name, and speak in a clear voice. I would like to ask you to turn off your cell phones because it gets a lot of -- she can't -- it picks up interference.

At this time, I would like to ask a few
individuals from DLLR to introduce themselves. They're not necessarily will be on the Evaluation Committee, but they are sitting in for purposes to clarify any questions you may have.

    We'll start here.

    MS. THOMAS: Good morning. I'm Latesa Thomas, Chief of Procurement.

    MR. MORTON: I'm Dennis Morton. I'm the Deputy Assistant Secretary for Unemployment Insurance.

    MS. GANLEY: Melissa Ganley, VMW Project Director.

    MR. GODWIN: And I am Glen Godwin, the Project Manager for the State of Maryland.

    MS. SMITH: Monique Smith, Assistant to the Program Director.

    MS. CRISAFULLI: I would like everybody to turn to page 4. I just want to talk about some key information. I'll go over, reiterate the TO project number is DLLR-FY-2015-005 [sic]. And functional area 10, IT Management Consultant Services. The TORFP was issued July 30, 2015 [sic]. The questioned due date and
time is August 12th at 2 p.m. local time. The closing
date for this procurement is August 20, 2014, at 2:30
p.m., local time. Please submit all questions to the
Procurement Officer, me, Sandy Crisafulli. The period of
the performance is three base years with two one-year
renewal options. There's no MBE goal. There's no vet
goal and no SBR goal.

Move to page 8. I just want to talk to you
about 1.11, the travel reimbursement. Expenses for
travel performed in completing tasks for the TORFP shall
be -- shall not be reimbursed. I just wanted to make
that clear.

Now I would like you to go to page 10, and
we're going to turn it over to Melissa so she can go over
the scope.

MS. GANLEY: Hello. The first thing I want to
point out is that obviously for many of you, you've seen
this in a different iteration, and at a former Pre-
proposal Conference we had our partners from West
Virginia and Vermont here. They are, unfortunately, not
able to attend today's meeting, but they are with us in
spirit. So it truly is a three-state project, and it's
unfortunate they weren't able to make it for this, for
this Pre-proposal Conference. But they will certainly be
part of any future interviews and the work going forward.

As Sandy pointed out, one of the biggest
differences for this solicitation is the MBE goal, the
fact that that has been removed. There are a few other
things that I want to go through and highlight. I'm
going to start on page 10, third paragraph down, where
the second sentence begins with the word however. In the
first version we had a Senior Project Manager and Junior
Project Manager. Now we simply have the Senior Project
Manager, and that is further emphasized down in the
seventh paragraph where it says for making an award
determination, the TO contractor shall propose exactly
one. We only want one. We don't want a whole list.
We're looking for one individual Senior Project Manager.

Moving forward to page 12, just to give you a
global picture of the project, this solicitation is for
the project management services. So we want -- and these
project management services will help guide us in our
work with the design and development vendor. The contractor selected for this procurement is not eligible for work with that design -- to do any of the design work. So we'll have this Project Management Office to help the consortium and be an independent voice for the consortium in working with the vendor. And then we're also going to have obviously the design vendor, and we already have secured a legal vendor for -- to be a resource in contract negotiations down the road. So there are three procurements as part of this project, and this is the second of the three.

Page 13, 2.72 at the bottom of the page. The TO contractor shall provide individuals to deliver Core PMO services in the following areas as directed by the TO Manager or designee. So, again, we only want the one Senior Project Manager, and after we have that one Senior Project Manager, additional resources will be onboard at the discretion of the consortium. And that's for all other services. Now we do want a staffing plan submitted. So we want to see what -- and that's to give us an idea of your experience with the size and
complexity of the project. How do you see this? When do
you see resources being brought in? But the ultimate
decision on when those resources are involved is at the
discretion of the consortium.

Page 21 talks to additional project services,
and those are the ones that we envision that we will
need, but we certainly can't give you an hour. We don't
know. They're not part of Core. These will most likely
be on work order time and material basis as opposed to
any fixed cost. So we certainly, one of the requirements
is that each TO contractor who is submitting bids for
this solicitation has these resources listed at their
disposal, and however you want to select those
individuals is up to your discretion, but we want, if we,
if we call you up and say, you know, we think we're going
to need a group facilitator, you should be able to get
one relatively easily.

I want to point out, page 29, Section 2.10,
Minimum Qualifications. These are the same as they were
before, with the exception of number three. In the
previous version, you may remember that there were two --
or excuse me. There were three IT projects. We've
reduced that to two. As for the rest of the minimum
qualifications, we did discuss them at length within the
three -- between the three states, and we feel strongly
that we want a company who has had background doing the
size and scope of a project. So they are -- these
minimum qualifications will not be changed further beyond
the reducing of the -- as we already said, we reduced it
from three projects to two project. As they are stated
here in this document is what they will remain.

And then, lastly, I want to flip over to
Section 4, page 39. And that is looking down at
Selection Procedures, B and C. We are going to hold
interviews with the contractor again to see that the
contractor, that the TO contractor has experience
providing services that meet this level of a project.
But then also we're going to interview the Project
Manager to make sure that that is a good fit as well. So
it is a two-prong approach to the selection.

I really think that that's about it for me,
Latesa.
MS. THOMAS: Okay.

MS. CRISAFULLI: I just wanted to go over one other thing. I wanted you all to take a look at page 34 to make sure you understand how to submit the proposals in the proper format so you won't make any mistakes. Just make sure you pay attention to that. And make sure that you submit with the required -- the required responses. That's pretty much all I wanted to say. If you have any questions about the TORFP, please submit in writing before the closing date questions, which is August 12th.

Is there any questions for any of us up here?

MS. RECZKIEWICZ: So any questions -- Kathy Reczkiewicz, CSG, any questions that we have, we should just put in writing. We should not ask those at this time.

MS. CRISAFULLI: You can ask them at this time, and we will respond in writing.

MS. RECZKIEWICZ: Okay. May I ask?

MS. CRISAFULLI: Sure.

MS. RECZKIEWICZ: In Section 3.4.1.A.3.
MS. CRISAFULLI: What page are --

MS. RECZKIEWICZ: Oh, boy.

UNIDENTIFIED SPEAKER: 3.4.1 --

MS. CRISAFULLI: 35.

MS. RECZKIEWICZ: Yes.

(Simultaneous comments.)

MS. CRISAFULLI: Okay.

MS. RECZKIEWICZ: Instructs the contractor shall provide an initial staffing plan based on the notional project schedule. What does the State mean by notional? What should be included in this part of the response? Are we talking about -- breakdown structure? So just to clarify what notional means.

MS. GANLEY: Am I allowed --

MS. CRISAFULLI: Yes.

MS. GANLEY: Do I need to respond in writing?

MS. THOMAS: No. You can respond now.

MS. GANLEY: We're looking for a sequential and approximate timeline. You would imagine that at this point in the project you'd be bringing on this type of a resource, and at this point in the contract you'd be --
on this. So it's not a formal detailed work breakdown
structure, but we do want to get an idea that you know
during which phase, during what point in the project you
are going to need to pull in those additional resources.

MS. RECKIEWICZ: Thank you.

MS.GANLEY: Glen, do you have anything to add
to that?

MR. GODWIN: No, that's exactly right. Exactly
what we're looking for. A rough timeline.

MR. HASSLER: Can I follow-up with that
question?

MS. GANLEY: Sure.

MR. HASSLER: Bill Hassler, Edwards Project
Solutions. So earlier in the document you described that
you had gone through Phase 1, which is SCLC Phases 1
through 4. So you have a high level understanding of
what the requirements are going to be for this pursuit.
Could the State allow the contractor base to understand a
little bit better about the size, scope and complexity of
these three unique systems that are going to be legacy
systems that are going to be replaced? Because, you
know, if it's a $10 million venue, it may have one
level of staffing for that staffing plan. Or if it's
$100 million venue, there are differences in the
complexity when -- understand that the steps are still
the same, but giving a staffing profile is a little bit
difficult not understanding the complexity of this
software --

MS. GANLEY: We have approximately 400 use
cases to cover the three business -- functional areas,
tax appeals and benefits. I'm trying to think of the
numbers to give you.

MR. GODWIN: I'm trying to think about -- yeah,
you're right what the use case is about what, 900
individual requirements have been identified. Those
requirements of course they run the gamut from very --
easy to understand stuff to some more complex stuff. But
there's about 900 requirements. How many use cases did
you say?

MS. GANLEY: Approximately 400.

MR. GODWIN: About 400 use cases.

MS. GANLEY: Maybe a little bit more.
MR. GODWIN: The use cases are extensive. We are, we are quite keen on seeing that those use cases are addressed. I mean we can tell you that.

MS. GANLEY: And each use case does have pre-conditions and post-conditions, and it's a very -- the requirements are pretty -- they're still high level, but they are, you know, they do connect, and they show the web of how everything intertwines between the three systems and should intertwine.

MR. HASSLER: So for the 400 use cases, how many are common to all three states and how many are unique?

MS. GANLEY: I'd say probably about 90 percent of our requirements are common between the three states, and the 10 percent that are different are designated as different.

MR. HASSLER: Thank you.

MR. GODWIN: And we have identified those. All requirements are identified as common to all states or we indicate the states to which they're applicable. So we do have a pretty good handle on that. And as Melissa
said, 90 percent, possibly more are common.

MS. GANLEY: We try to do the requirements keeping them as common as possible. And where they're not common is usually some state law or reason that was not changeable by simple business process.

MR. HASSLER: Thank you.

MS. RECZKIEWICZ: Kathy Reczkiewicz, CSG. I have a page number this time. Page 37h, Offeror General Information, number iii, instructs contractors to submit with the technical proposal MBE participation, submit completed MBE documents, Attachment 2, Forms D-1 and D-2. Can the State please confirm that this was included mistakenly?

MS. CRISAFULLI: This was mistaken. And it was sent out as an addendum on July 31st.

MS. RECZKIEWICZ: I did not receive it. I'm sorry.

MS. GANLEY: The addendum, I believe, just addressed 2. or 1.5.

MS. CRISAFULLI: Right.

(Simultaneous comments.)
MS. RECKKIEWICZ: And along those same lines, the list of attachments, notes that the Minority Business Enterprise participation attachments that are applicable to this TORFP must be submitted with the proposal.

Again, that's not --

MR. GODWIN: We missed that.

MS. CRISAFULLI: Does anyone have any questions about the minimum qualifications?

MR. HASSLER: I think it's pretty clear that -- this is Bill Hassler again, Edwards Project Solutions, that subcontractor will not be considered as part of the minimum. So a team configuration will not be considered.

MS. GANLEY: That's correct.

MR. HASSLER: It has to be the prime.

MS. GANLEY: There was a question over there.

MR. LAYMAN: Yes. Dean Layman, Leidos. You make it clear that no travel expenses will be reimbursed, but is the contractor expected to make out-of-town trips to like Vermont and West Virginia as far as --

MS. GANLEY: The majority of the work will be done in Baltimore, but, yes, there will be times we'll
ask, you know, whether it's the Senior Project Manager or
one of the other staff members to travel to the other
states.

MR. LAYMAN: Is there a way to quantify about
how many trips that would possibly be?

MS. GANLEY: I think we talked about eight per
year. Is that, Glen, is that about what you remember?

MR. GODWIN: Well, for the PMO folks, I don't
think it would be that many. I envision the first year
probably three.

MS. GANLEY: Three trips?

MR. GODWIN: Yeah. One or two to Vermont and
the other to West Virginia. And then a lot of the work
will be done here. They'll be coming here as well. So I
would say three trips for the first year is a good
estimate. Subsequent years the same. I would use that.
We'll, you know, our feeling is as the project progresses
and everyone, you know, learns how to work through our
processes and procedures that we should be able to
possibly minimize some of that travel, but that would be
in the later years. For the first two years I would
definitely count on three trips per year.

MS. CRISAFULLI: Any other questions about the minimum qualifications or anything else?

MS. RECZKIEWICZ: This is Kathy from CSG one more time. I just want to clarify the oral presentations -- interviews they will in fact -- Section 1.5 says it will be required. Then Section 4.3 says it may be required. So they will occur, correct?

MS. GANLEY: For qualified offerors.

MS. RECZKIEWICZ: Okay. And that two-prong approach, can we assume that the company and the Project Manager interviews will occur on the same day?

MS. GANLEY: Yes.

MS. RECZKIEWICZ: Okay. Thank you.

MS. GANLEY: We certainly wouldn't want to, you know, make companies travel on different days. That makes more sense.

MS. RECZKIEWICZ: Thank you.

MR. HASSLER: Bill Hassler, Edwards Project Solutions. Do you have an anticipated award date for this contract?
MS. GANLEY: We --

MR. HASSLER: -- would you like to have.

MS. GANLEY: Given that we're already a little bit further behind the schedule where we wanted to be, I, my, my goal is late September, early October.

MR. HASSLER: Thank you.

MS. CRISAFULLI: She's still thinking.

MR. GODWIN: No more questions?

MS. CRISAFULLI: Okay. This concludes the conference, and I thank you all for coming out.

(Whereupon, the Pre-Proposal Conference concluded at 9:50 a.m., on August 8, 2014.)
CERTIFICATE

This is to certify that the attached proceedings before the Department of Labor, Licensing and Regulation in the matter of:

Pre-Proposal Conference
Consulting and Technical Services
Task Order Request for Proposals
Vermont, Maryland and West Virginia (VMW)
UI Modernization (UIM)
Project Management Office (PMO)

PLACE: Baltimore, Maryland

DATE: August 8, 2014

were held as herein appears, and that this is the original transcript thereof for the file of the Department.

Cathy Belka, Reporter
FREE STATE REPORTING, INC.
### DEPARTMENT OF LABOR LICENSING AND REGULATION
#### SIGN-IN SHEET

August 8, 2012 at 9:30 A.M.

(VMW) UI Modernization (UIM) Project Management Office (PMO)

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