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TO: MASTER CONTRACTORS

FROM: Dorothy M. Richburg
Procurement Officer

RE: Pre-Proposal Conference
TORFP NO. R00B4400085
Information Technology Professional (Senior)

DATE: 19 March 2014

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In addition to the attendance sheet
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THANK YOU.**

Attached are the following documents:

1. Minutes from the Pre-Proposal Conference held on Thursday, March 13, 2014;
2. Questions received after the Pre-Proposal Conference; and
3. Attendance Sheet

**PROPOSALS ARE DUE NO LATER THAN
2:00 PM EDT, Thursday, April 10, 2014**

MARYLAND STATE DEPARTMENT OF EDUCATION

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MR. BLACKBURN:

Welcome everyone. This meeting is to discuss the TORFP R00B4400085. This is for Information Technology Professional at the Senior Level. The closing date on this will be April 10th. The period of performance is going to be for a calendar year from the notice to proceed. And there are three one-year renewal options. There's no MBE goal but there is a Small Business Reserve. So we will introduce ourselves and then give a brief overview, and then take questions. So we can start down at the end and work around clockwise, I guess, and introduce ourselves.

MR. OBINNA:

Good afternoon, everyone. My name is Chima Obinna. I'm the Project Manager for this particular project.

MS. SATTERFIELD:

And I'm Jean Satterfield and I'm the Assistant State Superintendent for Educator Effectiveness and this is part of my project.

MR. BLACKBURN:

James Blackburn, Procurement, MSDE.

MR. BOURI:

Jay Bouri, NT Technologies.

MS. CERASI:

RheaAnn Cerasi, Wood Consulting Services.

MS. DEISHER:

And Kandace Deisher, United Solutions.

MR. CHAMBERS:

And I'm Doug Chambers, Conference Reporting Service.

MR. BLACKBURN:

Very good. And I guess Mr. Obinna will give us an overview.

MR. OBINNA:

Yes, I'll give you the overview. This particular TORFP is a re-bid or re-compete. We have a Senior Developer on board and this is a re-compete or re-bid because of the CATS II to CATS+ transition. So essentially this Senior Developer is part of the overall project to expand the Educator Information System, and this Senior Developer is an expert in Microsoft Customer Relationship Management, and part of their duties a current production system into the new system under Race to the Top. This is a four-year project and the incumbent has been here for three years.

QUESTIONS – ANSWERS--CLARIFICATIONS

MR. BLACKBURN:

Okay. Very good. So we're going to start taking questions. We'll go clockwise. No offense to the ladies. We'll start with Mr. Bouri over here and work all the way around the room.

MR. BOURI:

Who is the incumbent on this?

MR. BLACKBURN:

Who is the incumbent?

MR. BOURI:

Who is the incumbent, yes.

MR. OBINNA:

Alent.

MR. BOURI:

Alent.

MR. OBINNA:

Yes.

MR. BOURI:

Okay.

MS. DEISHER:

I'm sorry. Can you repeat that?

MR. OBINNA:

Alent.

MS. SATTERFIELD:

A-L-E-N-T.

MR. BLACKBURN:

Ms. Cerasi, do you have a question?

MS. CERASI:

Are you happy with the person doing this work now, with their performance?

MR. OBINNA:

Yes.

MS. CERASI:

Okay.

MR. BLACKBURN:

Gentlemen, are you prepared to ask some questions or do you want to wait until the next go around?

MALE VOICE:

We'll just...

MR. BLACKBURN:

Okay. Great. Ms. Deisher, do you have any questions?

MS. DEISHER:

Yes. In Section 1.7, which is the conflict of interest section, it specifies that the contractor may be precluded from participating on future related procurements. Do you anticipate that that will cover many future procurements, or what kind of scope of that?

MR. OBINNA:

In terms of this particular project, no, I don't see, I don't, whoever wins it is not going to be precluded from participating on future related procurements

MS. DEISHER:

Sole source.

MR. OBINNA:

Sort of a newer category, so that particular person, not necessarily the company, so the Company can, bid on contracts within the State of Maryland.

MR. BLACKBURN:

Does that satisfy your question?

MS. DEISHER:

Yep.

MR. BLACKBURN:

Okay. Go ahead. Mr. Bouri, do you have a question?

MR. BOURI:

Yes. This is the purpose of the TORFP, which is expansion of the, I guess, and not too long ago, the CATS+ award was made to the Canton Group under 004. Was this somehow related with that?

MR. OBINNA:

Yes, it is related. Initially when we started this project, we got one resource in. Later on we needed to expand our resource pool, so we awarded a contract to the Canton Group contract.

MR. BOURI:

So that was a shortened expansion, wasn't it?

MR. OBINNA:

No.

MR. BOURI:

What...

MR. OBINNA:

They're a part of this. Yeah. They're still part of the overall project.

MR. BOURI:

I see.

MR. OBINNA:

Yes.

MS. SATTERFIELD:

But they just came on board.

MR. OBINNA:

Right.

MR. BOURI:

Not too long ago.

MR. OBINNA:

Sometime in November. We didn't want to go out and keep on having to use TORFP's to select resources so we decided to just get a company in that would supply us with those resources. So that's what that, was.

MR. BOURI:

So are they eligible to bid on this one or are, they are pre —

MR. BLACKBURN:

Precluded?

MR. BOURI:

Yeah.

MR. OBINNA:

I think, I think they were still eligible to bid. They can pick up to five resources. So they can provide it. But this is a separate contract from their contract.

MR. BOURI:

Can I continue the question after ...

MR. BLACKBURN:

This is a second part of the question?

MR. BOURI:

Yes. Because this is the, you're saying this is in a way an upgrade of the CRM system?

MR. OBINNA:

Yes.

MR. BOURI:

So then that is an expansion so are you saying it's separate because of the upgrade?

MR. OBINNA:

No, not separate because of the work. Okay. Let me try to break it down.

MS. DEISHER:

Will this individual be working with that same team?

MR. OBINNA:

He's not on the team.

MS. DEISHER:

But is he working in conjunction with them?

MR. OBINNA:

He's working, yes, he's working on the project. So he's the Senior Developer overseeing their development.

MR. BOURI:

Okay... the person from Alent.

MR. OBINNA:

Yes.

MR. BOURI:

Okay.

MR. OBINNA:

Oversees their development. So a Project Manager that oversees him, that oversees their development.

MR. BOURI:

Right.

MR. OBINNA:

So he's not part of their group.

MR. BOURI:

Okay. So their... Staff fit in there, in that hierarchy?

MR. BLACKBURN:

One moment, one moment.

(Pause)

(Off the record)

MR. CHAMBERS:

We're back on. Go ahead.

MR. BOURI:

So going back to the question. The Project Manager, Senior Developer, and the Canton Group, are aware this proposed Staff are going to fit in, in that --

MR. OBINNA:

No, this is the same, this is a Senior Developer. This is not a separate person.

MR. BOURI:

Okay, this is, okay.

MR. OBINNA:

Yeah. That's why I say. This is a re-bid.

MR. BOURI:

Okay.

MR. BLACKBURN:

Okay. Very good. Ms. Cerasi?

MS. CERASI:

No. Thank you.

MR. BLACKBURN:

Would you gentlemen introduce yourselves and then feel free to ask a question.

MR. ACHREYA:

Arayan Achreya from I-Cube Systems. No questions.

MR. HARJANI:

Sandeep Harjani, from Infojini, Inc. No questions.

MR. BLACKBURN:

Okay. And you, Ms. Deisher?

MS. DEISHER:

Yes, I do. For clarification. So it's been said that this is an expansion but then in the TORFP it talks about a shortened version somewhat. Can you elaborate on whether this is truly an expansion or if it is simply converting from the, I don't remember which version it was. But over 2001.

MR. OBINNA:

So part of the expansion, so expansion is the overall name of the project.

MS. DEISHER:

Okay.

MR. OBINNA:

The overall name of the project is Expand Education Information System.

MS. DEISHER:

Okay.

MR. OBINNA:

So part of that expansion is to upgrade from a previous system to a new system and add more stuff to it.

MS. DEISHER:

So there is a pure conversion within this bigger expansion project?

MR. OBINNA:

Yes.

MS. DEISHER:

So does this mean you're working on a full expansion or just conversion?

MR. OBINNA:

No, it's part of the whole project, yes.

MS. DEISHER:

Okay.

MR. OBINNA:

Yes.

MS. SATTERFIELD:

We're collecting more data on teachers and principals to use to identify areas of strengths and weaknesses in our public schools.

MS. DEISHER:

Okay.

MR. BLACKBURN:

Very good. Mr. Bouri?

MR. BOURI:

Yes. I do have another question.

MR. BLACKBURN:

Please.

MR. BOURI:

On page 15, you have listed the minimum qualifications for the offeror company. Now, obviously these qualifications, they are pretty stringent and something in mind. And if you have an offeror company with a subcontractor with that kind of experience, I would assume that being the first sub team that would satisfy the requirements.

That is part of the overall CATS+ guidelines?

MR. OBINNA:

Because we're not, we're not looking for a, we're looking for an individual versus looking for a company itself. So the minimum requirement is for the personnel proposed, not necessarily the -- the master contractor?

MR. BOURI:

That refers to the company.

MR. OBINNA:

Oh, yeah. Shall have one project and at least five years provided technical support. Yeah. So essentially it refers to that, if the company has a proposed individual that has some,

that refers to the, it's sort of a roll-up. So the company has worked on that, yes, but they'll have to have an individual or, would have worked on something.

So for example, Alent. If this particular person wasn't the person proposed or it wasn't a re-bid, then you could say Alent has had that experience because they had proposed, these particular individuals has worked on.

MR. BOURI:

Let's not talk about Alent.

MR. OBINNA:

Yeah. So I'm just saying. I'm just giving an example of another company.

MR. BOURI:

Let's say Company A.

MR. OBINNA:

Company A has ...

MR. BOURI:

Company A as a prime contractor proposing on this one.

MR. OBINNA:

Uh-huh.

MR. BOURI:

And they bringing in Company B as a subcontractor.

MR. OBINNA:

Okay.

MR. BOURI:

So you have a prime/sub relationship, becomes a team under CATS+.

MR. OBINNA:

Yes.

MR. BOURI:

So that would qualify.

MR. OBINNA:

That will qualify.

MR. BOURI:

Because B has the qualifications to satisfy this.

MR. OBINNA:

Yes. Yes.

MR. BOURI:

That's where I'm at.

MR. OBINNA:

Yes. To answer your question. Yes.

MR. BLACKBURN:

Very good. Ms. Cerasi?

MS. CERASI:

No, thank you.

MR. BLACKBURN:

Okay. Mr. Achreya?

MR. ACHREYA:

No.

MR. BLACKBURN:

Mr. Harjani?

MR. HARJANI:

No questions.

MR. BLACKBURN:

Ms. Deisher?

MS. DEISHER:

Yeah. Sorry.

MR. BLACKBURN:

Not at all.

MS. DEISHER:

I've seen it differently and that's why I ask this question, but in 3.2.1 B), on page 16, in the proposed personnel, you asked for a resume as well as the Attachment 5, which is the resume summary. Do you want both or do you want one of those or? Essentially they contain --

MR. OBINNA:

They contain...

MS. DEISHER:

-- the same information.

MR. OBINNA:

They contain the same information. And what some folks do is you receive both of it in one, you see the resume here and then when you turn to the back you see this other summary. However, both is fine. Yeah.

MR. BLACKBURN:

If I could add my two cents. I'm one of the people that process these. So that's fine, as he is saying. People give us both, which is fine. Because they can have a different layout.

MS. DEISHER:

Yes.

MR. BLACKBURN:

Yeah, present it, and I think it's probably a plus for everyone.

MS. DEISHER:

Okay.

MR. BLACKBURN:

So you've got the official form, but you also have a format that presents your client in the best, or your candidate in the best light. Also, I would ask that everyone remember to put the candidate's name on that form, either, sometimes it's Attachment 4, sometimes it's numbered Attachment 5. The name of the candidate and the name of the company. Occasionally we get some without, and then it's hard to match them up. And one other thing, because I've been processing so many of these lately, that I would ask is that you somehow or somewhere let us know if it's a man or a woman, which doesn't sound like much. But in fact, it is, because there

are times when we have to address correspondence and I prefer to address correspondence as Mr. or Ms., and particularly with names that are not of European origin, it's difficult to tell the gender of the person to whom we're addressing. So either put in a he or a she or ...

When I put out the resume books, I just started doing that, putting Mr. or Ms. in front of the candidates' names so that the interviewers will know ahead of time whom they're addressing.

Okay. Mr. Bouri, do you have any questions?

MR. BOURI:

Yes, I do have a couple of more questions to clear up confusion.

MS. SATTERFIELD:

That's why we're here.

MR. BOURI:

2.1.3. Work order process. Being staff of additional hours of that section is irrelevant?

MR. OBINNA:

Irrelevant.

MR. BOURI:

We're going right along. We can find one to ask for a proven solution to address the issue. That is irrelevant too?

MR. OBINNA:

That's irrelevant.

MR. BOURI:

Okay.

MR. BLACKBURN:

And I assume your questions are related because they all pertain to sections that may be irrelevant, right?

MR. BOURI:

Okay. They are there because of the boiler plate instruction.

MR. BLACKBURN:

Yes.

MR. BOURI:

If the proposal doesn't address to that, it's not a grounds for ...

MS. DEISHER:

Can I ask a question that piggybacks off one of his?

MR. OBINNA:

Uh-huh.

MS. DEISHER:

On the work order section, you said that was irrelevant and if you look at the key information and the key summary sheet, on the T.O. type that says kind of material is based on work orders. So is it anticipated that this individual will be a full-time from notice to proceed onward without work orders or? Okay. So that's just a...

MR. OBINNA:

Yeah. We use the work orders for the companies that are actually providing the solution.

MS. DEISHER:

Okay.

MR. BOURI:

Right.

MR. OBINNA:

Yes, but not the particular individual.

MR. BOURI:

Okay.

MR. BLACKBURN:

You want to get ... go ahead.

MR. BOURI:

4.2, the second bullet. This will be evaluation criteria for section on proposal. The Master Contractor's proposed solution and understanding since there is no proposed solution, so this bullet --

MR. OBINNA:

That bullet is irrelevant.

MR. BOURI:

That will be deleted or declared irrelevant.

MR. OBINNA:

Yes.

MR. BOURI:

Okay. That's all.

MR. BLACKBURN:

Okay. We've got all of our irrelevants in. Thank you for cleaning house.

MR. BOURI:

Yes, sir.

MR. BLACKBURN:

Ms. Cerasi, do you have any questions?

MS. CERASI:

No, sir.

MR. BLACKBURN:

Mr. Achreya?

MR. ACHREYA:

No.

MR. BLACKBURN:

Mr. Harjani?

MR. HARJANI:

No questions.

MR. BLACKBURN:

And Ms. Deisher again?

MS. DEISHER:

I'm not sure if you'll be able to answer this, but is there an anticipated labor category that you prefer us to use, because this is kind of a broad, broad scope responsibilities for the individual, so I didn't know if you had one in mind that you wanted contractors to use or...

MR. OBINNA:

There is none ... you do the proposing.

MS. DEISHER:

Yes.

MR. OBINNA:

So it's not that ... whatever the Senior Developer is. If not, in the labor category you propose to us.

MS. DEISHER:

Okay.

MR. OBINNA:

Yeah.

MR. BLACKBURN:

Very good. Okay. We'll do one more go-round here. Mr. Bouri, Ms. Cerasi?

MS. CERASI:

No, sir.

MR. BLACKBURN:

(Inaudible) and winding up with Ms. Deisher.

MS. DEISHER:

Okay.

MR. BLACKBURN:

And I think we're all set. Anyone think of anything you would like to add before we close? No? Do you have anything to add?

MR. OBINNA:

No, just thank you guys.

MS. SATTERFIELD:

Thanks for coming here and talking to us.

MR. OBINNA:

Thank both of you for your questions. I'm keeping count. He had 9; you had 8.

(Laughter)

MR. OBINNA:

He beat you. Thank you, guys, for coming out.

MS. SATTERFIELD:

Thank you very much for coming down and parking and coming here. It's not the easiest place to get to.

MR. BLACKBURN:

Very good. Then we'll call it a day. Thank you.

(Whereupon, at 1:30 the proceedings were adjourned.)

The following questions were received after the Pre-Proposal Conference:

2.9.1 OFFEROR COMPANY MINIMUM QUALIFICATIONS

The following minimum qualifications are mandatory. The Master Contractor shall be capable of furnishing all necessary services required to successfully complete all tasks and work requirements and produce high quality deliverables described herein and identified throughout the project. The Master Contractor shall demonstrate, in its proposal, that it possesses such expertise in-house or has fostered strategic alliances with other firms for providing such services:

- Master Contractor firm shall have one project in the last five years where they have provided technical support of a Microsoft CRM system that supports an organization with an excess of 10,000 users.

=====

- a) Is the above applicable to proposed individual of this TORFP? **No**
- b) We hope the proposed individual will be working with MSDE PM to execute assigned tasks. Is MSDE expecting the master contractor to take PM responsibility and direct/assign tasks to proposed individual ? **No**
- c) Is it a service provider type TORFP? **No**
- d) If a master contractor has resources that matches your need, will he able to respond to this TORFP? **The Master Contractor should submit the candidate.**