

Agenda

PRE-PROPOSAL CONFERENCE

April 7, 2015

TORFP - LONG TERM SUPPORTS AND SERVICES SYSTEM (LTSS) OPERATIONS & MAINTENANCE (O&M)

DHMH-OPASS-15-14386

Agenda

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|------------------------------------|---|
| Opening Remarks & Introductions | Queen Davis Office of Procurement and Support Services (OPASS) |
| Overview of Procurement Process | Queen Davis, Procurement Supervisor, OPASS |
| Background, Purpose, Scope of Work | Susan Harrison Mike Curtis Medicaid, Office of Health Services |
| Q & A | |
| Closing | Queen Davis, OPASS |

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"TORFP - LONG TERM SUPPORTS AND SERVICES SYSTEM (LTSS) Operations & Maintenance (O&M)"
M00B5400373 / DHMH/OPASS 15-14386

DHMH Participants:

- Queen Davis, TO Procurement Officer – Office of Procurement and Support Services
- Susan Harrison, Contract Monitor – Office of Health Services
- Mike Curtis, Project Manager – Office of Health Services
- Whitney Moyer – Office of Health Services

Attendees:

- Beth A. Wong (MBE) – Powersolv, Inc.
- Luis Valdivieso (MBE) – Gantech
- Mike Boyle (MBE)– TCC
- Kalia Kinser (MBE)– Infojini, Inc
- Paul Johnson (MBE)– NERDS Group
- Om Bansal – AiNET Corp
- Rodney Wildermuth – Dynaxys
- Rick Wheeler (MBE) – Oakland Consulting Services, Inc
- Lynn Davis (MBE) – MVS, Inc.
- Allison Hartner (MBE) – ITNOVA, LLC
- Chirag Bhatt – FEi Systems
- Ron Rhodes – FEi Systems
- Donella Brockington – Xerox State & Local Solutions, Inc.
- George Hardy – Xerox State & Local Solutions, Inc.

DHMH PRESENTED INFORMATION:

Queen Davis, TO Procurement Officer

DHMH is issuing this CATS+ TORFP to obtain one (1) Master Contractor who shall provide commercial off-the-shelf (COTS) software, hardware and networking technologies to provide managed hosting services for DHMH's LTSS System, in accordance with the scope of work described in this Section 2.

The contract resulting from this solicitation will be in effect From 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 13. Carefully review this section to get a full understanding of the requirements of this Task Order Request for Proposal.

Offerors are required to submit their responses to the TORFP in two parts. Section 3 – TASK ORDER PROPOSAL FORMAT AND SUBMISSION REQUIREMENTS Subsection 3.2 (beginning on page 59) clearly lists all submission requirements. The TO Proposal shall be submitted via two e-mails.

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DHMH 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 # M00B5400373 Technical" plus the Master Contractor Name
- One attachment labeled "TORFP M00B5400373 Technical - Attachments" containing all Technical Proposal Attachments (see Section 3.3 below), signed and in PDF format.
- One attachment labeled "TORFP M00B5400373 Technical – Proposal" in Microsoft Word format (2007 or later).

The TO Financial Proposal shall be contained in one e-mail containing as attachments all submission documents detailed in section 3.4.2, with password protection. DHMH will contact Offerors for the password to open each file. Each file shall be encrypted with the same password. Subject line "CATS+ TORFP # M00B5400373 Financial" plus the Master Contractor Name

- One attachment labeled "TORFP M00B5400373 Financial" containing the Financial Proposal contents, signed and in PDF format.

A 25% MBE goal has been established for the contract resulting from this TORFP. Be sure to complete the MDOT Certified MBE Utilization and Fair Solicitation Affidavit (Attachment 2 - Minority Business Enterprise Forms).

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 3.

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.

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| Closing Date and Time: | 5/12/2015 at 2:00 PM Local Time |
|-------------------------------|--|

Susan Harrison, Contract Monitor – Background on LTSS/ISAS

1. Live system, launched over 2 years ago, ongoing expansion activity
2. Incumbent's contract was scheduled to end on June 30, 2015; however, on April 1 the Board of Public Works approved an extension through December 31, 2015 (refer to BPW Agenda item 5D on p. 45 for details: <http://bpw.maryland.gov/MeetingDocs/2015-Apr-1-Agenda.pdf>)
3. Receive enhanced federal funding to build and run the system
4. O&M is 75% federal match program

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5. Many care management waiver programs fall within the LTSS system
6. One of the first states to create such a care management system, success story for CMS
7. High interest from other states, frequent inquiries

Mike Curtis – Project Manager

1. Purpose (TORFP p. 13)
 - a. Looking for one master contractor for operations and maintenance (O&M) to provide all commercial COTS software, hardware, network support, and hosting
 - b. Receive compiled code and put in pre-pod environment that contractor will host and then deploy to production
 - c. Tier 1 help desk support, tier 2 for O&M related inquiries
 - d. Need to work with software developer and DHMH on issue escalation
 - e. Management of credentials
 - f. Processing interfaces, batch and claims file processing (HIPAA X12, EDI transmissions)
 - g. Logic that takes activity and translates into the claims files comes from the software contractor, but the submission to DHMH's claims adjudication system is performed by the O&M contractor (balancing and reconciliation is required)
 - h. Maintain library of compiled code
 - i. Four named resources, not necessarily 100% full-time equivalent (FTE)
 - i. Project Manager
 - ii. Help Desk Lead
 - iii. Operations Lead
 - iv. Senior Network Engineer
2. Attachment 1 (TORFP pp. 69-69) – Pricing
 - a. Fixed-price
 - b. Transition-in period fixed-price (90 days)
 - c. Monthly O&M fixed-price has two line items – Operations and Managed Hosting Services
 - d. Optional Services price sheet includes aspects we expect could change, as well as the opportunity for Offeror to propose anything else they feel would be necessary to scale
3. High probability that the LTSS/ISAS will increase substantially in size, perhaps double within 18 months; therefore, contractor needs ability to scale up to meet DHMH's needs
4. System Information (TORFP starting on p. 17)
 - a. Section 2.6, p. 18: ~150,000 claims per month baseline claims activity
 - b. Help Desk handles several thousand inquires per month and works extended hours for ISAS components
 - c. IVR and Help Desk ~300,000 calls per month, vast majority are IVR (TORFP p. 23)
 - d. Host pre-pod and production environments (TORFP p. 24)
 - e. Attachment 20 – Details schematics description of the technical solution, application layers, networking, etc.
5. SLAs (TORFP p. 34)

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- a. System response time SLA requires contractor to establish a baseline prior to Go Live that is the basis for future monitoring
- b. Contractor and DHMH will establish a verification script for measuring system response time
- 6. Help Desk Hours (TORFP p. 41)
- 7. Proof-of-concept (PoC)
 - a. DHMH directly contracted with network engineer resources who are working with current O&M vendor to build out a PoC to help with understanding and documenting setup of the technical infrastructure to support new vendor with transition
 - b. Current O&M vendor (FEi Systems) is also responsible to support the transition (during the 90-day transition period) to the new O&M vendor
- 8. RavenDB
 - a. O&M vendor required to acquire software license
 - b. Support, maintenance and tuning of RavenDB is the responsibility of the software development vendor, since this is a unique database management system with limited resources knowledgeable to support them. DHMH determined it is in the best interest of the Agency to keep responsibility of this component outside of the scope of this O&M TORFP.
- 9. OTP Devices
 - a. O&M vendor required to acquire software license
 - b. Support and management is not included in the scope of this O&M TORFP; however, it is likely that the Help Desk will field inquires on OTP devices that should be routed to DHMH

END of PRESENTED INFORMATION

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QUESTIONS

Questions 1 – 18 are from the pre-bid conference; additional questions came in to DHMH outside the pre-bid forum.

1. Q: Who is doing tier 3 Help Desk support? (George Hardy, Xerox)
A: *The O&M contractor is responsible for tier 1 Help Desk. Escalation to tier 2 could go to the software development vendor (custom software related inquiries), DHMH (policy inquiries) or stay within the O&M contractor (operations or managed hosting related inquiries), depending on the nature of the inquiry.*
2. Q: Who has the software contract? (Lynn Davis, MVS)
A: *FEi Systems*
3. Q: Is FEi eligible to bid? Are they current O&M vendor? (Donella Brockington, Xerox)
A: *FEi is eligible to bid on this TORFP. They are the incumbent O&M vendor. This began as one contract, which was split into two TORFPs, one for software development and this one for O&M.*
4. Q: What was original contract MBE goal? What is the MBE goal for the software component? (Lynn Davis, MBS)
A: *5% is the goal on the original contract. 5% is the goal on the software development TORFP.*
5. Q: Will vendors be able to get list of attendees? (Ron Rhodes, FEi)
A: *Yes, list of attendee and minutes will be made available.*
6. Q: What is target date for award? (Donella Brockington, Xerox)
A: *Around August*
7. Q: Is intent for 90 days to be completed prior to end of the year? (Donella Brockington, Xerox)
A: *Yes*
8. Q: Awarded vendor will be responsible for COTS software. Would the awarded vendor be responsible for purchasing software? (Donella Brockington, Xerox)
A: *Yes, they would be responsible for obtaining the COTS licenses that are necessary for the offeror's proposed technical solution.*
9. Q: Would the existing IVR be replaced? (Donella Brockington, Xerox)
A: *There is no expectation the existing IVR would be transferred. The offeror should propose an IVR solution that meets the Agency's needs. During the 90-day transition period, it is*

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expected that there is collaboration to setup and configure the IVR. Custom code is the responsibility of the software development vendor.

10. Q: Is offeror responsible for providing additional language support? (Allison Hartner, ITNova)

A: English and Spanish capability is required; however, this does not mean you need Spanish-speaking staff around-the-clock.

11. Q: Claims processing is a file transfer, not the actual claims processing – correct? (George Hardy, Xerox)

A: Offeror is responsible for the file transfer, including the balancing and reconciliation reporting, similar to a clearing house function. DHMH's MMIS II system receives the files and performs the adjudication.

12. Q: All questions aren't due until April. When are they posted? (Ron Rhodes, FEi)

A: We answer and post on a rolling basis. Offerors should send questions as soon as possible.

13. Q: Are resumes part of proposal? (Beth Wong, Powersolv, Inc.)

A. Yes, for four key personnel. There's also a substitution process. Resumes need to meet minimum requirements set forth in the TORFP. You cannot substitute during the evaluation period.

14. Q: IVR seems integrated with software. If new IVR is brought in, wouldn't there need to be an integration process? What is the current IVR software, is it COTS? Has integration been done with the current software? (Rodney Wildermuth, Dynaxis)

A: Current IVR software is Microsoft Lync, refer to TORFP Attachment 20 (pp. 130 – 131). The IVR is an integrated component of the LTSS system. The integration process depends upon the offeror's proposed solution; and, the proposal should describe in detail the IVR integration, as well as any assumptions and/or requirements from the State and/or software development vendor.

15. Q: Are you looking for additional software solutions? (Beth Wong, Powersolv, Inc.)

A: No software development within the scope of this RFP.

16. Q: Are you happy with current vendor? (Beth Wong, Powersolv, Inc.)

A: Can't answer question.

17. Q: This is a federal grant? (Beth Wong, Powersolv, Inc.)

A: No; however, the State receives federal match up to 75%.

18. Q: Can you make scripts for IVR available? (George Hardy, Xerox)

A: The IVR flow and prompts are attached.

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19. Q: Reference, page 4: Key Information Summary Sheet. Questions Due Date and Time: 4/16/2015 at 2:00 PM Local Time. Will the State respond to vendor questions as received, or will all questions be aggregated and responded to after the April 16th deadline for question submittal? It would be helpful if offerors could receive answers to questions prior to late April, so that State guidance can be incorporated into solution development early in the proposal generation process. (from FEi, 4/8/2015)
A. Same as question #12.
20. Q: Reference, p.23: SOW Section 2.6.2.2. TO Contractor shall provide a disaster recovery (DR) data center location in the continental United States that is at least twenty-five (25) miles from the primary facility. Disasters have the potential to span a geographic area wider than 25 miles. Will the State consider changing this requirement to a larger separation of the production and DR sites? We would recommend no less than 100 miles. (from FEi, 4/8/2015)
A. Twenty-five (25) miles is the minimum requirement. Offerors may propose a wider span.
21. Q: Reference, p 23: SOW Section 2.6.2.7. - TO Contractor shall provide dedicated services with no comingling of data or resources with other clients other than the State of Maryland. This includes all internet connectivity. Please confirm that, in addition to non-Maryland clients, the comingling restriction defined in Section 2.6.2.7 also applies to offeror's corporate data and resources. (from FEi, 4/8/2015)
A: We are confirming that this applies to corporate data and resources.
22. Q: Reference, p 23: SOW Section 2.6.2.7. - TO Contractor shall provide dedicated services with no comingling of data or resources with other clients other than the State of Maryland. This includes all internet connectivity. Offerors may have different interpretations of the level of segmentation required to comply with this requirement. To ensure all proposals deliver the desired level of separation of 'data and resources' please provide guidance on the solution components. (from FEi, 4/8/2015)
A: The TORFP clearly states that there should be no comingling of data or resources with other clients or the offeror's corporate data and resources.
23. Q: Reference, p.32: SOW Section 2.6.5.5 (b). End-of-Contract Transition: DHMH requires TO Contractor to collaborate with a successor Contractor over a ninety (90) day transition period. The Cost Proposal does not include a place for offerors to present the costs associated with the End of Contract Transition period. Should offerors assume this 90 day Transition Out activity will occur at the conclusion of a defined contract year, with pricing to be negotiated at the time of End of Contract transition? (from FEi, 4/8/2015)
A: There is no separate pricing for End of Contract transition. Transition would be within the contract time period and included in the overall cost.
24. Q: Reference, p.131: Attachment 20. Both the Ashburn and the Omaha data centers Internet connectivity is 1GB. The connection between the Ashburn and Omaha data centers is also a

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1GB VPN circuit with MPLS. There is a 1GB connection between the Ashburn data center and the Help Desk location. To ensure consistent cost proposals, please confirm that offerors should provision the following bandwidth as part of the initial deployment (from FEi, 4/8/2015):

- 1Gbps connections to both the production and DR data center locations
- 1Gbps connection between the production data center and the Help Desk location

A: Offerors may propose whatever technical solution they deem best meets the requirements outlined in the scope of work. The proposal should clearly describe the connectivity specifications.

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DHMH/ Office of Health Services

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Tuesday, April 7, 2015 @ 10:00 AM

OPASS 15-14386

| Name | Company Name Address | Phone Number | Fax Number | E-mail Address | Certified MBE | |
|--------------------|-------------------------|------------------|---------------|--|-------------------------------------|-------------------------------------|
| | | | | | YES | NO |
| BETH BOONIG | POWERSOLV | 301-395 1039 | | LONGBAE POWERSOLVINC.COM | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Luis Valdivieso | Gantech | | | lvaldivieso@gantech.net | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Mike Boyle | TCC | 317-625- 2547 | | mboyle@cc-tel.com | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| KALIA KINSER | INFOSTINI INC | 443-908- 0416 | | KALIA.KINSER@ INFOSTINI CONSULTING.COM | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Paul Johnson | NERDS Group | 301-801- 9546 | | paul@nerds.net | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Om Bansal | AiNET Corp | | | Om.Bansal@ai.net | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Rodney W. Dermuth | DYNAMIXYS | 301-622-0900 | | rodney@dynamixys.com | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

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| Name | Company Name Address | Phone Number | Fax Number | E-mail Address | Certified MBE | |
|------------------|--|-----------------|---------------|--------------------------------|---------------|----|
| | | | | | YES | NO |
| Rick Wheeler | OAKLAND Consulting | 410-340-9753 | | RWheeler@OCCG-INC.com | X | |
| Lynn Davis | MVS, INC. | 202-722-7987 | | ldavis@mvsconsulting.com | X | |
| Allison Hartnick | ITInova, LLC 1910 Towne Center Blvd Suite 250, Knoxville | 248-514-7518 | | ahartnick@itnovaconsulting.com | ✓ | |
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