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STATE OF MARYLAND  
CENTRAL COLLECTIONS UNIT  
DEPARTMENT OF INFORMATION TECHNOLOGY

Pre-Proposal Conference

Central Collections Unit (CCU) Debt Collection  
Information System (DCIS) Project #F50B2400052

201 West Preston Street  
O'Connor Building  
Conference Room L-1  
Baltimore, Maryland

June 26, 2012

- DONNA ZIEGENHEIN, Procurement Officer
- JESSE LAWYER, Deputy Director, CCU
- MONTEZ FOSTER, Fiscal Administrator, CCU
- SHEILA GRAHAM, Deputy Project Manager, CCU Modernization Project
- DAVID WOODARD, Program Manager, CCU, Modernization Program
- STACIA CROPPER, Department of IT
- ANTHONY FUGETT: Director, CCU
- CHARLES BRISTOW, MDOT
- DOUG CARREY-BEAVER: Counsel for DoIT

1 PRESENT FOR VENDORS:

2 SUSAN DAWSON, FosterKnowledge

3 BETH WONG, Powersolv, Inc.

4 ROBERT ROBB, CR Software

5 MIKE TEKAMPE, CGI

6 JEAN MERRILL, CGI

7 M. MICKEY WILLIAMS, JR., MJW Solutions

8 STEVE ARD, RevQ

9 ANDREA L. DUNATHAN, Dunathan Consulting

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1 MR. BRISTOW: Chuck Bristow, Maryland  
2 Department of Transportation.

3 MR. CARREY-BEAVER: Doug Carrey-Beaver, counsel  
4 for the Department of Information Technology.

5 UNIDENTIFIED SPEAKER: -- want to introduce  
6 anybody else.

7 MS. ZIEGENHEIN: Okay. I'm going to make sure  
8 -- has everyone signed in? There were sign-in sheets  
9 floating around. If you haven't, please make sure that  
10 you see me. Make sure that you have signed in. And  
11 also, if you have a business card, I need at least one  
12 business card from everybody. And does everybody have a  
13 copy of the agenda? Okay.

14 The purpose of today's conference is to give  
15 potential bidders information and guidance on the  
16 requirements of this procurement. Today's session is  
17 merely for guidance. You should not rely on any verbal  
18 communication for information. Questions must be  
19 submitted in writing to me, the Procurement Officer, for  
20 a formal response.

21 I'd like to review a few important areas in the

1 solicitation. And be sure to review the Key Information  
2 Summary Sheet on page 3. Proposals are due on July 19th  
3 at 2 p.m. This is a change. The original due date has  
4 been changed by Amendment 1, and it was posted last week.  
5 Proposals may not be submitted by e-mail or fax. All of  
6 the solicitation is important, but there are some  
7 critical information sections that we'd like to go over  
8 today.

9           In Section 2.3, Minimum Qualifications, be sure  
10 you address all minimum qualifications in your technical  
11 proposal. The minimum qualifications are on page 39.

12           Submission requirements are extremely important  
13 as well. Section 3 is where you'll find all the  
14 submission requirements. Pay very close attention to the  
15 instructions. Your proposals must be submitted in two  
16 separate volumes: Volume 1, Technical Proposal; Volume 2,  
17 Financial Proposal. Each volume is to be in a separate  
18 sealed package. Supply one unbound original and five  
19 copies of each technical and financial. Also you must  
20 include an electronic version of Volume 1, the technical  
21 in Microsoft Word format, and an electronic version of

1 Volume 2 the financial, in Microsoft Excel format, marked  
2 appropriately and stored separately. The electronic  
3 version may be a CD or a flash drive, and this was also  
4 in Amendment 1. This is a change. Pay particular  
5 attention to 3.4.2, format of the technical proposal. Be  
6 sure to include in your technical all the required  
7 documents and signed affidavits for Section 3.4.2.9,  
8 located on page 56.

9           The MBE requirements on this solicitation,  
10 there is a zero goal. However, we strongly encourage  
11 wherever possible MBE participation.

12           Are there any Maryland-certified MBE companies  
13 here today?

14           MS. DAWSON: Yeah.

15           MS. ZIEGENHEIN: Would you stand up for a  
16 moment, introduce yourself and just tell us what services  
17 your company offers?

18           MS. DAWSON: Susan Dawson. My company is  
19 FosterKnowledge. We provide training, technical writing,  
20 documentation -- testing --

21           MS. WONG: Beth Wong, Powersolv, Inc. We are a

1 system application integration. We also provide  
2 training, electronic document management -- professional  
3 services.

4 MS. ZIEGENHEIN: Thank you. Next I'd like to  
5 remind everybody a few important things on the price  
6 sheets. I'm not going to read all of the price sheet  
7 information, but some real important items. All fixed  
8 prices and unit prices must be clearly entered in dollars  
9 and cents, and cannot be contingent on any other factors  
10 or conditions. NO Cost items must be entered in zero  
11 dollars and zero cents. Every blank in the price sheet  
12 should be filled out with relevant data. It's imperative  
13 that all price sheets are entered correctly. Pricing  
14 must be provided for out-of-the-box functionality.

15 Once again, the price proposal should be sealed  
16 and then separate from the technical proposal.

17 For communications and questions, all  
18 communications, again, must be in writing for an official  
19 response. Questions should be sent by e-mail to me. My  
20 e-mail address is located on the agenda that was handed  
21 out today. There was a question and answer document

1 number one, which was posted on eMaryland last week, and  
2 hopefully everybody was notified of that by e-mail or by  
3 eMaryland.

4           The contract will be awarded to the most  
5 advantageous offer to the State considering all the  
6 evaluation criteria located in Section 4.

7           And just a reminder before I turn it over to  
8 David and his team to overview the project, if your  
9 proposal is late even by a minute, I cannot accept it.  
10 There are no exceptions to this rule. So please give  
11 your company plenty of time to allow the proposal to  
12 reach my office.

13           Now, David, would you like to give an overview  
14 of the project?

15           MR. WOODARD: Great. Thank you. And first I'd  
16 like for Tony Fugett to speak to the CCU just for a  
17 moment, please.

18           MR. FUGETT: Good afternoon. Section 1.4 gives  
19 an overview of the Central Collection Unit. Makes for  
20 good reading. It talks a little bit about our  
21 introduction, what our mission is, the history, our

1 organizational structure. Talks a little bit about what  
2 we do in Collections, the Legal Measures Department, our  
3 Accounting staff, and the Program Development staff. And  
4 it would make for good reading in terms of what we do.  
5 So I won't repeat that today. What it does not say is  
6 that we are a special funded organization, and we charge  
7 a 17 percent collection fee. And we pay all of our  
8 expenses, salaries and everything from that collection  
9 fee. They were profitable, and hopefully will remain  
10 profitable. We have about 1.7 billion in receivables  
11 today of active accounts, and our total receivables are  
12 about 2.1 billion.

13 That's all I have.

14 MR. WOODWARD: Great. Thank you, Tony.

15 Okay. Just want to bring everybody's attention  
16 to Section 2, the Statement of Work. I wanted to point  
17 out a couple of key items. Number one, it is the State's  
18 intention to procure a state of the art commercially  
19 available DCIS COTS application. So the intent is once  
20 again a commercial off-the-shelf. This part of the  
21 solicitation is to bring in the core software for the CCU

1 Program. We do reference in this section that there will  
2 be a follow-on implementation solicitation, but the focus  
3 of this is to strictly stay focused on core COTS  
4 software.

5           One of the things I'd like to point out is we  
6 are looking for the offerors to identify the total  
7 solution, and that should be outlined in Appendix E as  
8 Donna had noted before. So all functionality, including  
9 any complementary products or third-party applications  
10 that are required to meet the requirements.

11           Another item to point out, and as Donna  
12 addressed, we have responded to questions last week.  
13 Software configurations and customizations for meeting  
14 the RFP requirements, they will be performed in the  
15 implementation solicitation and outside the scope of this  
16 RFP.

17           Moving to Section 2.3, the Technical  
18 Architecture, we are requesting that offerors recommend  
19 the technical infrastructure for what we're calling both  
20 the post-award evaluation and the production software  
21 environments, and that's to include servers, storage,

1 networks, devices, operating systems, utilities, security  
2 and middleware. The State will be providing the  
3 infrastructure, and we're looking for the offeror to make  
4 recommendations on what technical environment would be  
5 most appropriate for their offering.

6           Referencing 2.4, Functional and Technical  
7 Requirements, that's the majority of the requirements.  
8 Basically it's the entire -- requirements that we have  
9 for the solicitation. We're asking people to follow the  
10 instructions accordingly.

11           And those are the main items as far as the  
12 summary that we wanted to highlight today.

13           MS. ZIEGENHEIN: Okay. We can take questions  
14 now.

15           MS. WONG: Question. So basically right now  
16 this is solely procurement of the COTS. The second part  
17 you mention like implementation, that will be a second  
18 --

19           MR. WOODWARD: Right.

20           MS. WONG: -- another solicitation.

21           MR. WOODWARD: Yes, that's correct. As it's

1 outlined in Section 2.1.3, there are two solicitations  
2 planned. This one is focusing on the software  
3 procurement.

4 MS. WONG: So to complete these projects, so  
5 how many stages will be involved here?

6 MR. WOODWARD: At this stage we have two  
7 solicitations planned.

8 MS. WONG: Just the COTS?

9 MR. WOODWARD: The procurement and then the  
10 implementation services.

11 MS. WONG: Wait, wait a minute. This one is  
12 just procurement of the COTS. Then there will be -- when  
13 do you expect the implementation to take place?

14 MR. WOODWARD: Yeah, in Section 2.1.3, it  
15 references it could take from one and a half to two years  
16 for the next solicitation to be released.

17 MR. BRISTOW: If I may, Bob, would you -- for  
18 questions, if you would stand up and just identify  
19 yourself for the record. Beth, we have, we have you  
20 recorded.

21 MS. WONG: Thank you. Beth Wong, Powersolv,

1 Inc. So, again it's two stages that you have. So now  
2 it's just a COTS procurement. The second after one and a  
3 half years, that will be the implementation, is that  
4 correct?

5 MR. WOODWARD: Well, the expectation is it  
6 could take one and a half to two years for the next  
7 solicitation to come through. What we're focusing on  
8 this one is the RFP that's due on the 19th of July.

9 MS. WONG: Okay.

10 MR. ROBB: Robert Robb with CR Software. For  
11 Attachment I.1, Functional Technical Requirements,  
12 knowing that there might be some COTS software that don't  
13 go through all of the different categories such as  
14 abatements, payment processing, and that, is there a  
15 weight of what is most important versus least important  
16 from an evaluation standpoint for the State --

17 MS. CROPPER: The requirements are not  
18 weighted.

19 MS. WONG: Question again. Beth Wong,  
20 Powersolv, Inc. How many agencies are involved here? I  
21 know there's a number of you from the State, you know,

1 doing the presentation here for this requirement.  
2 There's MDOT, there's -- or this is purely MDOT or in  
3 coordination they do it?

4 MS. CROPPER: This is a project for the  
5 Department of Budget and Management.

6 MS. WONG: So the main agency procuring this is  
7 DBM.

8 MS. CROPPER: That's right. DoIT and -- DoIT  
9 is DBM's IT shop.

10 MS. WONG: But the recipient of this product  
11 is the --

12 MS. CROPPER: Department of Budget and  
13 Management, Central Collections Unit.

14 MS. WONG: Okay. Because I saw some of the  
15 location where the software would be integrated are five  
16 places, correct?

17 MS. CROPPER: That's right, but it's DBM  
18 Central Collections Unit. So CCU provides services where  
19 they're needed. It's still CCU's product.

20 MR. NUGGET: And then there are 400 clients  
21 that will have access to the system, which would be

1 State-wide.

2 MR. ROBB: I have one more. Can you talk a  
3 little bit more about the post-award training for us so  
4 we can price it properly? What the expectations of the  
5 training would be for CCU staff, DoIT staff on, you know,  
6 from an administration side as well as the collection --  
7 the collector side. Be it for lack of a different word,  
8 at the end of it where we do the turnkey how extensive is  
9 that, is that training on there? Is it completely self-  
10 sufficient for CCU and DoIT?

11 MR. WOODWARD: I mean I can go back to Section  
12 2.11, its very reference to training. And the intent is  
13 we have a training that is considered by the offeror  
14 appropriate to demonstrate their software. To bring the  
15 State up-to-speed so that the system can be used  
16 properly.

17 MS. CROPPER: That's it? Be the shortest Pre-  
18 Proposal Conference in history.

19 MS. WONG: One more.

20 MS. CROPPER: Okay.

21 MS. WONG: Follow-up on that, piggyback. The

1 training is that training the users or training the  
2 trainers? Follow-up his question that he mentioned about  
3 training. Once the software has been integrated, there  
4 will be training so to speak. So would that be training  
5 the trainers within --

6 MR. WOODWARD: Once again, we are looking for  
7 the offeror to provide the recommended training program.

8 MS. CROPPER: We're not mandating the training.  
9 We're asking you to make a recommendation on appropriate  
10 training for the product being proposed.

11 MS. WONG: But you can give us approximately if  
12 it is training the trainers rather than training the  
13 users, how many people we're talking about.

14 MS. CROPPER: Tony can talk to how many  
15 ultimate end users there are, but we're not mandating  
16 that it be train the trainer or train the end user.  
17 Based on your experience with the products you are  
18 proposing, we're asking you to tell us what you think the  
19 best approach is.

20 MS. ZIEGENHEIN: Remember, you can always  
21 continue to send questions in writing as well. The

1 cutoff for questions is not until July 5th.

2 MS. WONG: Okay.

3 MS. ZIEGENHEIN: So you can continue to send  
4 anything that you want an official response, send it in  
5 writing.

6 MR. TEKAMPE: So I have a question. Mike  
7 Tekampe with CGI. So approximately a year ago there was  
8 a procurement for roughly the same scope as what we're  
9 looking for here. I was wondering if anybody can  
10 elaborate on some of the thinking in canceling that  
11 previous procurement and activities that have gone on in  
12 the year since, and then maybe highlight some of the  
13 major changes in this procurement versus the previous  
14 procurement.

15 MS. CROPPER: Sure. What we did was we went  
16 through all of the requirements and determined those that  
17 we decided were absolute core requirements. So actually  
18 you should see substantial changes in the RFP. So it's  
19 not essentially the same at all. It's considerably  
20 different in that we've dwindled or focused our attention  
21 on those products that we believe are core. And so

1 that's the single biggest element that changed.

2 MR. TEKAMPE: So more focused on the functional  
3 requirements of --

4 MS. CROPPER: That's right.

5 MR. TEKAMPE: -- have been changed.

6 MS. CROPPER: Um-hmm. Is that it?

7 MS. WONG: -- you had mentioned questions due?  
8 When -- further question? I guess I --

9 MS. ZIEGENHEIN: Yes. I still have a few  
10 reminders at the end.

11 MS. ZIEGENHEIN: No more questions? Okay. I'm  
12 just going to remind you again-- official response, all  
13 questions must be in writing. Make sure you allow enough  
14 time for the proposals to reach me before the due date  
15 and time. Proposals must be in two separate files; one  
16 marked Technical, one marked Financial, one unbound and  
17 five copies of each. A summary of today's meeting and a  
18 list of all attendees will be distributed as soon as  
19 possible. And the cutoff for questions is July 5th at 5  
20 p.m. I believe it's 5 p.m. Yes, July 5th at 5 p.m.

21 If there aren't any other questions, we'll

1 conclude the meeting at this time.

2           (Whereupon, the Pre-Proposal Conference  
3 concluded at 2:20 p.m., on June 26, 2012.)

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