

Supplement B
Department Of Budget And Management
ACTION AGENDA
September 20, 2017



*Contact: Jamie Tomaszewski 410-260-7386
jamie.tomaszewski@maryland.gov*

1-S. DEPARTMENT OF BUDGET AND MANAGEMENT

*Procurement Policy & Administration
Services Contract*

Contract ID: Customer Service Training & Process Improvement Consultation Master Contract; ADPICS #050B7400008

Contract Description: Statewide Master Contract with 18 Master Contractors to perform customer service and process improvement consultation to State agencies and related training to employees of those agencies through a variety of formats.

Awards:	See page 4B
Term:	10/5/2017 (or earlier upon BPW approval) – 9/30/2022
Amount:	\$2,000,000 Est. NTE
Procurement Method:	Competitive Sealed Proposals
Proposals:	N/A (see Requesting Agency Remarks)
MBE Participation:	20% (see Requesting Agency Remarks)
Performance Security:	N/A
Incumbents:	None

Requesting Agency Remarks: A notice of availability of the Request for Proposals (RFP) was advertised on *eMaryland Marketplace* and the Department of Budget and Management (DBM) website. Copies of the solicitation notice were emailed directly to 400 prospective vendors, including 290 minority businesses and 90 veteran-owned small businesses. A copy was also sent to the Governor's Office of Small, Minority, and Women Business Affairs.

This contract will provide State agencies with access to consultants and training organizations that can provide expertise in customer service, employee engagement, and process improvement. By improving State agency processes, customer satisfaction will be achieved; and therefore, ultimately improving customer service throughout the State.

Supplement B
Department Of Budget And Management
ACTION AGENDA
September 20, 2017



1-S. DEPARTMENT OF BUDGET AND MANAGEMENT (cont'd)

The purpose of this contract is to retain companies with established customer service training curricula to provide customized agency-specific customer service and process improvement consultation to State agencies that request a task order and related training to employees of those agencies through a variety of formats in furtherance of Governor Hogan's Statewide Customer Service Initiative launched in June 2015. While larger agencies may have internal training resources, many agencies will require support and assistance from external sources including consulting and training organizations. To that end, DBM issued a solicitation to procure consulting, training, and process improvement through a Customer Service Training Master Contract to support agencies' efforts to realize the Governor's Customer Service Initiative.

In the RFP, it was stated that all technically qualified offerors would receive Master Contract awards in order to maximize on-going competition for future Task Order Requests for Proposals (TORFPs). A total of 26 proposals were received, and 19 offerors were deemed responsible and their proposals determined to be reasonably susceptible of being selected for award. One offeror, Anne Arundel Community College, is being contracted through a Memorandum of Agreement with DBM. The other 18 offerors are being recommended for awards for the Master Contracts.

The RFP contained two Functional Areas (FAs): FA 1 is classroom-based training; and FA 2 is computer-based training. Both FAs contained process improvement consultation services. Offerors could propose in one or both FAs. Of the 18 offerors being recommended for awards, 13 are being recommended for award in both FAs; four are being recommended in FA 1 only, and one is being recommended in FA 2 only.

To initiate the Task Order Process, a State agency or other entity requesting customer service training and process improvement consultation services will develop a scope of work, including indicating the applicable FA. Task Order Requests for Proposals (TORFPs) will be initiated by a State Agency and issued solely by DBM, as needed, throughout the five-year term of the Master Contract. All Master Contractors awarded a contract in the FA specified in the TORFP scope of work will be invited to compete for each specific TORFP, except for Small Business Reserve (SBR) designated TORFPs that will be distributed exclusively to certified small businesses. If the user wishes to designate its TORFP as an SBR solicitation, then DBM reserves the right to designate the TORFP as an SBR TORFP. The resulting task order may then be awarded to a qualified Master Contractor that meets the statutory qualifications of a Small Business as defined in State Finance & Procurement §14-501(c), Annotated Code of Maryland, and is registered with the Maryland Small Business Reserve Program at the time of the Task Order award.

For each TORFP, Master Contractors will propose in the category or categories specific by the using agency. Because of the on-going competition afforded by shopping each TORFP to all Master Contractors in the applicable FA, it is hoped that the Master Contractors will propose to perform specific tasks at less than their maximum financial proposal rates.

**Supplement B
Department Of Budget And Management
ACTION AGENDA
September 20, 2017**



1-S. DEPARTMENT OF BUDGET AND MANAGEMENT (cont'd)

The *Award Amount* above is estimated for a total five-year period based upon a survey conducted with potential agency users. The actual amount of work resulting from this award is indeterminate and will be monitored by DBM. Should the amount approach the estimated total for the five year period, the Department will request an increase in the total award amount.

There is an overall 20% MBE participation goal established for the Master Contracts which each Master Contractor has committed to meet. Each TORFP will establish a specific MBE participation subcontracting goal for that particular task order.

In addition, there is an overall 5% Veteran-owned Small Business Enterprise (VSBE) participation goal established for the Master Contracts which each Master Contractor has committed to meet. Each TORFP will establish a specific VSBE participation subcontracting goal for that particular task order.

This Master Contract is available for use by any agency of the State of Maryland, including the judicial and legislative branches. In addition, all local governments and qualifying not-for-profit organizations in Maryland are permitted to use the contract to be awarded under this Item at the same prices and levels of service as for State agencies. Whereas usage of this contract by non-State of Maryland agencies is to be tracked and reported by the contractors, the requested contract approval amount listed on this Item is for State agency usage only.

- Fund Source:*** Various
- Appropriation Codes:*** Various
- Resident Businesses:*** See page 4B
- MD Tax Clearances:*** See page 4B

DBM Remarks: The Board of Public Works deferred this Item as Item 19-S from the 7/26/2017 Agenda.

BOARD OF PUBLIC WORKS ACTION – THIS ITEM WAS:

APPROVED	DISAPPROVED	DEFERRED	WITHDRAWN
WITH DISCUSSION		WITHOUT DISCUSSION	

Supplement B
Department Of Budget And Management
ACTION AGENDA
September 20, 2017



1-S. DEPARTMENT OF BUDGET AND MANAGEMENT (cont'd)

Awards:

Master Contractors	Functional Area(s)	MBE/VSBE Status	Resident Business? YES or No	MD Tax Clearance
Crowned Grace International Lanham, MD	1 and 2		Yes	17-2016-0001
Daniel Penn Associates Hartford, CT	1		No	17-2017-0000
Eagle Age Consulting Burtonsville, MD	1 and 2	MBE	Yes	17-2018-0000
Elevate USA Inc. Philadelphia, PA	1 and 2		No	17-2096-0000
FranklinCovey Salt Lake City, UT	1 and 2		No	17-2019-1111
Graduate School USA Washington, DC	1 and 2		No	17-2097-0110
International Training Consortium (ITC) Gaithersburg, MD	1 and 2	VSBE	Yes	17-2020-0111
ITnova Annapolis, MD	1 and 2	MBE/SBR	Yes	17-2021-1111
KPS/MCHT Partnership Baltimore, MD	1 and 2	MBE/SBR	Yes	17-2098-0111
Neovista Consulting LLC Hanover, MD	1		Yes	17-2022-0000
Operational Performance Solutions Inc. Westminster, MD	1 and 2	VSBE/SBR	Yes	17-2023-0111
Office Remedies Incorporated d/b/a ORI Herndon, VA	1 and 2		No	17-2024-0111
Public Consulting Group Boston, MA	1 and 2		No	17-2025-0111
Sheila Lee & Associates Baltimore, MD	1 and 2	MBE	Yes	17-2026-0110
The Integrity Team Severn, MD	1	MBE/SBR	Yes	17-2027-1111
The Performance Institute Washington, DC	1 and 2		No	17-2028-0000
Total Learning Solutions Glenn Dale, MD	1	MBE	Yes	17-2029-0111
Training and eTracking Solutions Brooklandville, MD	2		Yes	17-2030-0111