



LARRY HOGAN
Governor

BOYD K. RUTHERFORD
Lieutenant Governor

DAVID R. BRINKLEY
Secretary

MARC L. NICOLE
Deputy Secretary

AMENDMENT #2
To
REQUEST FOR PROPOSALS (RFP)
CUSTOMER SERVICE TRAINING
SOLICITATION NUMBER 050B7400008
MARCH 23, 2017

Ladies and Gentlemen:

The following Amendment is being issued to amend language and clarify information contained in the above-named RFP. All information contained herein is binding on all Offerors who respond to this RFP. The following change is listed below; new language has been double underlined and marked in red bold (ex. **new language**) and language deleted has been marked with a double strikeout (ex. ~~strike out~~).

1. Replace the RFP Key Information Summary Sheet with the sheet attached at the end of this Amendment to revise the **Proposal Due (Closing) Date and Time** as follows:

Proposal Due (Closing) Date and Time: **Thursday, April 6, 2017**~~March 30, 2017~~, 4 p.m. Local Time

2. Revised Section 1.1 (**Experience**), as follows:

1.1.1 **For Functional Area 1, Functional Area 2, or both Functional Areas 1 and 2,**

~~The~~ Offeror shall have three years of experience within the past five years providing consultation and training in at least one of the following customer service, employee engagement, or process improvement specialties:

- a) Corporate culture: e.g., developing relationships; creating transparency and trust; changing idleness to engagement; and proactive and anticipative execution;
- b) Customer loyalty: e.g., creating empathy and generosity;
- c) Employee engagement: e.g., coaching, mentoring, supervisory support, and recognition;
- d) Etiquette and professionalism: e.g., presentations and public speaking and addressing challenging situations; and
- e) Process improvement: finding efficiencies and eliminating redundancies in work environments.

3. Revise Section 1.2 (**Customer Service Training Curriculum**), as follows:

1.2.1. ~~For Functional Area 1, the Offeror shall have a~~ **For Functional Area 1, the Offeror shall have an established** customer service training curriculum capable of ~~both in-person and computer-based~~ deployment.

1.2.2 As proof of meeting this requirement, the Offeror shall provide with its Proposal a complete list of its course offerings and sample content from one or more courses. These may be provided in hardcopy or via access to a curriculum training demonstration website. ~~An offeror with a curriculum that is capable of computer-based deployment but that has never deployed its training by computer must further provide a plan detailing how its computer-based training would be deployed.~~

1.2.3 For Functional Area 2, the Offeror shall have an established customer service training curriculum capable of computer-based deployment.

1.2.4 As proof of meeting this requirement, the Offeror shall provide with its Proposal a complete list of its course offerings and sample content from one or more courses. These may be provided in hardcopy or via access to a curriculum training demonstration website. An offeror with a curriculum that is capable of computer-based deployment but that has never deployed its training by computer must further provide a plan detailing how its computer-based training would be deployed.

4. Revise Section 2.1 (**Summary Statement**), as follows:

2.1.1 The Department of Budget and Management is issuing this Request for Proposals (RFP) to secure a Master Contract with multiple Contractors to provide customer service and process improvement consultation to State agencies and related training to employees of those agencies through a variety of formats. **Functional Area 1 includes all classroom-based training and consulting. Functional Area 2 includes all computer-based training and consulting. Offerors may be awarded contracts for Functional Area 1, Functional Area 2, or both Functional Areas 1 and 2.**

2.1.6 The Department intends to make multiple awards to Qualified Offerors as a result of this RFP. **Awards may be for Functional Area 1 only, Functional Area 2 only, or both Functional Areas 1 and 2, based on the Offerors' Proposals.** See RFP Section 4.9 for Contract award information.

2.1.7 An Offeror, either directly or through its subcontractor(s), must be able to provide all services and meet all of the requirements requested in this solicitation **for the Functional Area(s) to which it is proposing** and the successful Offeror (the Contractor) shall remain responsible for Contract performance regardless of subcontractor participation in the work.

5. Revise Section 2.3.1 (**Task Order Process**), as follows:

2.3.1.1 To initiate the Task Order Process, a State Agency or other entity requesting customer service training or process improvement consultation services must first

notify the Contract Manager of its intent to procure these services via a TORFP, **including which Functional Area it desires**. The requesting Agency develops a Scope of Work (SOW) in collaboration with the Contract Manager and performs an MBE TORFP Project Review (PR) Assessment to determine the appropriate Minority Business Enterprise (MBE) subcontractor participation goal and subgoals for the project and a Veteran-Owned Small Business Enterprise (VSBE) TORFP PR Assessment to determine the subcontractor participation goal for the project.

2.3.1.2 TORFPs will be initiated by a State agency, issued solely by DBM, and will define the scope and requirements that meet the objectives of the requesting Agency. The Contract Manager releases the TORFP to the Master Contractors **in the applicable Functional Area** and the TORFP enters the Open Period. The Open Period is the time between the release date of the TORFP and the due date/time for Task Order Proposal submissions. During the Open Period, the Contract Manager is the sole contact for the requesting agency and the Master Contractors.

2.3.1.3 Information contained in the TORFPs shall include, but not necessarily be limited to, the following:

- A. Key Information Summary Sheet;
- B. Information required in any Executive Summary/Cover Letter;
- C. Scope of Work requirements (**including applicable Functional Area**), performance objectives, deliverables and terms;
- D. Experience and capabilities of Master Contractor and its subcontractors, and the proposed personnel;
- E. Security and invoicing requirements;
- F. Project and contract management requirements;
- G. Conflict of Interest, Confidentiality (See sample in Attachment Q), and/or Non-disclosure Affidavit requirements;
- H. Living Wage requirements;
- I. Minority Business Enterprise goal, Veteran Small Business Enterprise goal, Small Business Reserve, as applicable;
- J. Economic Benefits to Maryland;
- K. Applicable Labor Categories and Key Personnel;
- L. Completed Labor Category Summary Sheet (see sample Attachment Q) with resumes for each person proposed; and
- M. The criteria for making a Task Order Agreement (TOA) award determination and the relative importance of each criterion and price.

2.3.1.4 All Master Contractors **in the applicable Functional Area** (or SBR Master Contractors **in the applicable Functional Area** if the TORFP is designated a Small Business Reserve competition) that are not Suspended (see RFP Section 2.3.5) will be notified of the release of the TORFP, all amendments, pre-Task Order Proposal (TOP) conference notes, and other relevant materials until TOPs are due and received from the participating Master Contractors. Each Master Contractor receiving the TORFP must respond by providing a Task Order Proposal in response to the requirements of the TORFP, or a written notification to the Contract Manager that it does not intend to submit a TOP.

2.3.1.6 The Master Contractor is paid for services performed based on the ~~Fully Loaded Fixed Hourly Labor Category Rates~~ proposed in the TOP plus Non-Routine Travel (see Appendix 1 for definition) costs as may be identified and approved in a TOA, up to a specified cost ceiling. ~~The Master Contractor's Financial TOP and the final Not To Exceed dollar amount approved for each TOA are determined by multiplying the estimated number of Labor Hours by the approved Fully Loaded Fixed Hourly Labor Category Rates, plus Non-Routine Travel costs, if applicable.~~

4. Revise Section 2.3.8 (**Labor Categories**), as follows:

The Labor Categories and requisite qualifications approved for the Master Contract are set forth in the Master Contract Summary of Approved Labor Categories and Minimum Requirements table, contained in this section. Master Contractors shall utilize only these specified labor categories, the computer-based training rates **Functional Area 2** (see Section 2.3.9), and/or the classroom-based training rates **Functional Area 1** (see Section 2.3.10) when proposing to a TORFP and providing subsequent services under a TOA. Labor category rates may be used for consulting and customized curriculum development services as well as for training. Each TORFP will direct agencies to price their TOP according to a specified format using labor category rates, computer-based training rates **Functional Area 2**, classroom-based training rates **Functional Area 1**, or a combination of the above. However, in TORFPS requesting training, the Contractor shall bill for either the labor category rate for instructor or, as applicable, the classroom- or computer-based training **flat or per student** rates for the indicated number of participants, not both. Furthermore, if hourly rates for instruction are requested, the Contractor may not invoice for instruction preparation time; the Contractor may bill hourly rates for instruction in 15-minute increments from the time instruction to participants starts through the end of the instruction period, including lunch if applicable.

6. Revise Section 2.3.9 (**Flat Rate Computer-Based Training Sessions**), as follows:

2.3.9.1 Master Contractors **in Functional Area 2** may be tasked with providing computer-based customer service trainings on general customer service best practices, specific customer service topics, or other subjects as specified in the TORFP for the specified number of employees ~~for specific number of employees~~. Computer-based training sessions shall consist of at least one hour of content as specified in the TORFP and interactive activities, a downloadable handout to accompany course content that participants may save and reference after the completion of the session, and an assessment tool that captures participant's comprehension of the material. Assessment results and a report on each training session provided shall be submitted to the TOM within 30 days after end of scheduled deployment of computer-based training sessions. Participants shall have access to review each training session for at least one year following completion of session.

2.3.9.2 The Contractor awarded the TOA shall provide computer-based training, charging no more than the maximum rates for **either the computer-based flat training rate for** the applicable tier of participants **or the per student rate**, for the applicable Contract year as proposed in its Financial Proposal Form, Attachment B, **Functional Area 2**. A Contractor providing flat rate computer-based training

under Section B in response to a TORFP may invoice for the price of the tier reflecting the total number of participants authorized to participate in the training as specified in the TORFP. A Contractor providing computer-based training on a per-student basis under Section C may invoice for the price equivalent to its proposed per student rate multiplied by the number of participants authorized to participate in the training as specified in the TORFP. The Master Contractor may charge its proposed computer-based training rate for either the single, appropriate tier of participants as a flat rate, the per student rate, or Labor Category rates exclusively; it may not also charge more than one rate type. ~~Labor Category rates for deployment of computer-based training.~~

7. Revise Section 2.3.10 (**Flat Rate Classroom-Based Training Sessions**), as follows:

2.3.10.1 Master Contractors in Functional Area 1 may be tasked with providing classroom-based customer service trainings on general customer service best practices, specific customer service topics, or other subjects as specified in the TORFP for the specified number of employees for specified numbers of employees. Each classroom-based training session shall consist of at least 4 hours of training on content as specified in the TORFP, reinforcement activities, a handout and any other relevant materials to accompany course content that participants may save and reference after the completion of the session, and an assessment tool that captures participant's comprehension of the material. Assessment results and a report on each training session provided shall be submitted to the TOM within 30 days after the delivery of the classroom-based training sessions under a TORFP.

2.3.10.2 The Contractor awarded the TOA shall charge no more than the maximum rates for either the classroom-based flat training rate for the applicable tier of participants or the per student rate, for the applicable Contract year as proposed in its Financial Proposal Form, Attachment B, Functional Area 1, Sections B and C, respectively. The Master Contractor may charge its proposed classroom-based training rate for either the single, appropriate tier of participants as a flat rate, the per student rate, or Labor Category rates exclusively; it may not charge more than one rate type for deployment of classroom-based training. ~~If classroom-based training rates are specified as the basis of pricing in the TORFP, the TOA Contractor may charge its proposed classroom-based training rate for the single, appropriate tier of participants exclusively; it may not also charge Labor Category rates for delivery of classroom-based training.~~

8. Revise Section 3.1 (**Insurance Requirements**), as follows:

3.1.1 The Contractor shall maintain Commercial General Liability Insurance to cover losses resulting from, or arising out of, Contractor action or inaction in the performance of the Contract by the Contractor, its agents, servants, employees, or subcontractors, with a minimum limit of \$500,000 per occurrence and \$1,000,000 aggregate.

3.1.2 The Contractor shall maintain Errors and Omissions/Professional Liability insurance with minimum limits of \$1,000,000 per claim and annual aggregate.

3.1.3 The Contractor shall maintain Automobile and/or Commercial Truck Insurance as appropriate with Liability, Collision, and PIP limits no less than those required by the State where the vehicle(s) is registered, but in no case less than those required by the State of Maryland.

~~3.1.4 The Contractor shall maintain Crime Insurance endorsed to cover employee theft and third party fidelity with a minimum single loss limit of \$1,000,000 per loss, and minimum a single loss retention not to exceed \$10,000. The State of Maryland and the Department shall be added as a loss payee to this policy.~~

3.1.45 Within five (5) Business Days of recommendation for Contract award, and before any work begins, the Contractor shall provide the Procurement Officer with current certificates of insurance, and update such certificates periodically, but no less than annually in multi-year contracts, as directed by the Contract Manager. Such copy of the Contractor's current certificate of insurance shall contain at minimum the following:

- a. Workers' Compensation – The Contractor shall maintain such insurance as necessary and/or required under Workers' Compensation Acts, the Longshore and Harbor Workers' Compensation Act, and the Federal Employers' Liability Act.
- b. Commercial General Liability as required in Section 3.1.1.
- c. Errors and Omissions/Professional Liability as required in Section 3.1.2.
- d. Automobile and/or Commercial Truck Insurance as required in Section 3.1.3.
- e. ~~Crime Insurance as required in Section 3.1.4.~~

3.1.56 The State of Maryland shall be listed as an additional insured on any Commercial General Liability, Auto Liability, Professional/Cyber Liability, and excess liability or umbrella policies with the exception of Workers' Compensation Insurance, which is currently handled by the Chesapeake Employer's Insurance Company (formerly Injured Workers' Insurance Fund). This means the faces of the certificates of insurance for these policies must state, "The State of Maryland is an Additional Insured." All insurance policies shall be endorsed to include a clause that requires that the insurance carrier provide the Contract Manager, by certified mail, not less than 30 days' advance notice of any non-renewal, cancellation, or expiration. In the event the Contract Manager receives a notice of non-renewal, the Contractor shall provide the Contract Manager with an insurance policy from another carrier at least 15 days prior to the expiration of the insurance policy then in effect. All insurance policies shall be with a company licensed by the State to do business and provide such policies.

3.1.67 The Contractor shall require that any subcontractors providing primary services (as opposed to non-critical, ancillary services) under this Contract obtain and maintain the same levels of insurance and shall provide the Contract Manager with the same documentation as is required of the Contractor.

9. Revise Section 4.9 (**Award Basis**), as follows:

The Contract shall be awarded to all responsible Offerors submitting the Proposals that have been determined to be the most advantageous to the State in each Functional Area, considering price and evaluation factors set forth in this RFP (see COMAR 21.05.03.03F), for providing the goods and services as specified in this RFP. See RFP Section 6 for further award information.

10. Revise Section 4.16 (**Offeror Responsibilities**), as follows:

The selected Offeror shall be responsible for all applicable products and services (Functional Area 1 or Functional Area 2 or both Functional Areas 1 and 2) required by this RFP. All subcontractors must be identified and a complete description of their role relative to the Proposal must be included in the Offeror's Proposal. If applicable, subcontractors utilized in meeting the established MBE or VSBE participation goal(s) for this solicitation shall be identified as provided in the appropriate Attachment(s) to this RFP (see Section 4.26 "Minority Business Enterprise Goals" and Section 4.27 "Veteran-Owned Small Business Enterprise Goal").

11. Revise Section 5.4 (**Volume I – Technical Proposal**), as follows:

5.4.2.4 **Executive Summary (Submit under TAB C)**. The Offeror shall condense and highlight the contents of the Technical Proposal in a separate section titled "Executive Summary." The Summary shall identify the Service Category(ies) and Region(s) for which the Offeror is proposing to provide services (if applicable). It shall also identify whether the Offeror is proposing to provide services for Functional Area 1 or Functional Area 2 or both Functional Areas 1 and 2. In addition, the Summary shall indicate whether the Offeror is the subsidiary of another entity, and if so, whether all information submitted by the Offeror pertains exclusively to the Offeror. If not, the subsidiary Offeror shall include a guarantee of performance from its parent organization as part of its Executive Summary.

The Summary shall also identify any exceptions the Offeror has taken to the requirements of this RFP, the Contract (Attachment M), or any other attachments. Exceptions to terms and conditions may result in having the Proposal deemed unacceptable or classified as not reasonably susceptible of being selected for award.

If the Offeror has taken no exceptions to the requirements of this RFP, the Contract (Attachment M), or any other attachments, the Executive Summary shall so state.

5.4.5.6 **Offeror Technical Response to RFP Requirements and Proposed Work Plan (Submit under TAB E)**.

5.4.5.6.1 The Offeror shall address each Scope of Work requirement (RFP Section 2) for the Functional Area(s) for which it is proposing to provide services in its Technical Proposal and describe how its proposed services, including the services of any proposed subcontractor(s), will meet or exceed the requirement(s). If the State is seeking Offeror

agreement to any requirement(s), the Offeror shall state its agreement or disagreement. Any paragraph in the Technical Proposal that responds to a Scope of Work requirement shall include an explanation of how the work will be done. Any exception to a requirement, term, or condition may result in having the Proposal classified as not reasonably susceptible of being selected for award or the Offeror deemed not responsible.

5.4.2.7 Experience and Qualifications of Proposed Staff (Submit under TAB F). The Offeror shall identify the qualifications and types of staff proposed to be utilized under the Contract. **For the Master Contract, the only staff that must be proposed is the Master Contractor's Representative (RFP § 2.3.6). All other proposed staff must be identified in response to a TORFP.**

The Offeror shall describe in detail how the proposed staff's experience and qualifications relate to their specific responsibilities, including any staff of proposed subcontractor(s), as detailed in the Work Plan. The Offeror shall include individual resumes for the Key Personnel, including Key Personnel for any proposed subcontractor(s), who are to be assigned to the project if the Offeror is awarded the Contract. Each resume should include the amount of experience the individual has had relative to the Scope of Work set forth in this solicitation. Letters of intended commitment to work on the project, including letters from any proposed subcontractor(s), shall be included in this section.

The Offeror shall provide an Organizational Chart outlining personnel and their related duties. The Offeror shall include job titles and the percentage of time each individual will spend on his/her assigned tasks. Offerors using job titles other than those commonly used by industry standards must provide a crosswalk reference document.

5.4.3 Additional Required Technical Submissions (Submit under TAB O).

5.4.3.1 The following documents shall be completed, signed, and included in the Technical Proposal, under TAB O that follows the material submitted in response to Section 5.4.2.

- a. Completed Proposal Affidavit (**Attachment C**).
- ~~b. Completed Maryland Living Wage Requirements Affidavit of Agreement (**Attachment F-1**).~~
- b.** Offeror's Acknowledgment of TORFP MBE Participation Requirements (**Attachment D-1 MASTER**). See Section 4.26.
- c.** Offeror's Acknowledgement of TORFP VSBE Participation Requirements (**Attachment E-1 MASTER**). See Section 4.27.

10. Revise Section 5.5 (**Volume II – Financial Proposal**), as follows:

Under separate sealed cover from the Technical Proposal and clearly identified in the format identified in Section 5.2 "Proposals," the Offeror shall submit an original unbound copy, four (4) copies, and an electronic version in ~~Microsoft Word or Microsoft Excel~~ of the Financial Proposal **for Functional Area 1 or Functional Area 2 or both Functional Areas 1 and 2.** The Financial Proposal shall contain all price information in the format

specified in **Attachment B. Financial Proposals will be evaluated separately.** The Offeror shall complete the Financial Proposal Form only as provided in the Financial Proposal Instructions and the Financial Proposal Form itself. **Offerors shall provide prices for Contract years one through five for Functional Area 1 or Functional Area 2 or both Functional Areas 1 and 2. These are the maximum prices the State will pay under any TORFP or TOA for all proposed labor category, per student, and flat rates throughout the Contract term.**

11. Revise Section 6.2 (**Technical Proposal Evaluation Criteria**), as follows:

6.2.1 Offeror's Technical Response to RFP Requirements and Work Plan (See RFP § 5.4.2.6). The State prefers an Offeror's response to work requirements in the RFP that illustrates a comprehensive understanding of work requirements and mastery of the subject matter, including an explanation of how the work will be done. Proposals which include limited responses to work requirements such as "concur" or "will comply" will receive a lower ranking than those Proposals that demonstrate an understanding of the work requirements and include plans to meet or exceed them.

6.2.2 Experience and Qualifications of Proposed Staff (See RFP § 5.4.2.7)

6.2.3 Offeror Qualifications and Capabilities, including proposed Subcontractors (See RFP § 5.4.2.8 – 5.4.2.14)

~~6.2.4 Economic Benefit to State of Maryland (See RFP § 5.4.2.15)~~

12. Revise Section 6.3 (**Financial Proposal Evaluation Criteria**), as follows:

All Qualified Offerors (**see RFP § 6.5.2.4) will be evaluated based on the labor category rates, per student rates and flat rates** ~~will be ranked from the lowest (most advantageous) to the highest (least advantageous) price based on the Total Proposal Price~~ within the stated guidelines set forth in this RFP and as submitted on **Attachment B - Financial Proposal Form. Financial Proposals will be evaluated separately. Offerors shall provide prices for Contract Years one through five in Functional Area 1 or Functional Area 2 or both Functional Areas 1 and 2. These are the maximum prices the State will pay under any TOA for all proposed labor category, per student and flat rates throughout the Contract term.**

13. Revised Section 6.5.2 (**Selection Process Sequence**), as follows:

6.5.2.2 Technical Proposals are evaluated for technical merit ~~and ranked~~. During this review, oral presentations and discussions may be held. The purpose of such discussions will be to assure a full understanding of the State's requirements and Offeror's ability to perform the services, as well as facilitate arrival at a Contract that is most advantageous to the State. Offerors will be contacted by the State as soon as any discussions are scheduled.

6.5.2.3 Offerors must confirm in writing any substantive oral clarifications of, or changes in, their Technical Proposals made in the course of discussions. Any such written

clarifications or changes then become part of the Offeror's Technical Proposal. Technical Proposals are given a final review ~~and ranked~~.

6.5.2.4 The Financial Proposal of each Qualified Offeror (a responsible Offeror determined to have submitted an acceptable Proposal) will be evaluated ~~and ranked~~ separately from the Technical evaluation. After a review of the Financial Proposals of Qualified Offerors, the Evaluation Committee or Procurement Officer may again conduct discussions to further evaluate the Offeror's entire Proposal.

14. Revise Section 6.5.3 (**Award Determination**), as follows:

Upon completion of the Technical Proposal and Financial Proposal evaluations, **the Procurement Officer will recommend award of a Master Contract(s) to all technically qualified and responsible Offeror(s).** ~~and rankings, each Offeror will receive an overall ranking. The Procurement Officer will recommend award of the Contract to the responsible Offeror that submitted the Proposal determined to be the most advantageous to the State. In making this most advantageous Proposal determination, technical and financial factors will receive equal weight.~~

14. Revise Attachment B (**B-1: Financial Proposal Instructions**), as follows:

L) **The separately attached Revised Attachment B-2: Financial Proposal Form Excel spreadsheet has two worksheets (tabs): Functional Area 1 - Classroom-based Training; and Functional Area 2 - Computer-Based Training. On both worksheets,** ~~In Section A of the separately attached Excel spreadsheet, Offerors are to price the Fully Loaded Fixed Hourly Labor Category Rates that represent the maximum rates chargeable during each Contract year for the labor categories delineated and defined in Section 2.3.8 of the RFP; **and i** In Section B of the separately attached Excel spreadsheet, Offerors are to price the Fully Loaded Flat Rates for classroom-based training that represent the maximum rates chargeable during each Contract year for the indicated tiers of employees, in accordance with Section 2.3.10 of the RFP. In Section C of the separately attached Excel spreadsheet, Offerors are to price the Fully Loaded Flat Rates for computer-based training that represent the maximum rates chargeable during each Contract year for the indicated tiers of employees, in accordance with Section 2.3.9 of the RFP. In Section D, Offerors are to choose a response from the dropdown box.~~

For Functional Area 1, in Section B, Offerors are to price the Fully Loaded Flat Rates for each four-hour block of classroom-based training that represent the maximum rates chargeable during each Contract year for the indicated tiers of participants, in accordance with Section 2.3.10 of the RFP; and in Section C, Offerors are to include Fully Loaded per student rate for four hours of classroom-based training, regardless of how many students are in the training class.

For Functional Area 2, in Section B. Offerors are to price the Fully Loaded Flat Rates for each hour of computer-based training that represent the maximum rates chargeable during each Contract year for the indicated tiers of participants, in accordance with Section 2.3.9 of the RFP; and in Section C, Offerors are to include Fully Loaded per student rate for each hour of computer-based training, regardless of the number of students who take the training.

Offerors may provide prices for Functional Area 1 or Functional Area 2 or both Functional Areas 1 and 2, but will only be considered for task orders in the Functional Area(s) for which they submitted prices.

15. Replace the Attachment B: Financial Proposal Form - Statewide Customer Service Training RFP Excel spreadsheet with the attached **Amendment 2 Attachment B-2: Financial Proposal Form - Statewide Customer Service Training RFP with Functional Areas 1 and 2.**
16. Revise the RFP Attachments list as follows:

ATTACHMENT M – Contract (applies to Master Contract RFP)

This is the sample contract used by the Department. It is provided with the RFP for informational purposes and is not required to be submitted at Proposal submission time. Upon notification of recommendation for award, a completed contract will be sent to the recommended awardee for signature. The recommended awardee shall return to the Procurement Officer three (3) executed copies of the Contract within five (5) Business Days after receipt. Upon Contract award, a fully-executed copy will be sent to the Contractor.

ATTACHMENT N – Contract Affidavit (applies to Master Contract RFP)

This Attachment must be completed and submitted by the recommended awardee to the Procurement Officer within five (5) Business Days of receiving notification of recommendation for award.

ATTACHMENT O – DHR Hiring Agreement (applies to TORFPs)

If required (see Section 4.36), this Attachment is to be completed and submitted within five (5) Business Days of receiving notification of recommendation for task order award.

ATTACHMENT P – Sample Task Order Agreement (TOA) (applies to TORFPs)

This is a sample TOA for informational purposes only.

ATTACHMENT Q – Sample Labor Category Summary Sheet (applies to TORFPs)

Issued and authorized by:

Pamela Malech
<Signed>
Procurement Officer

STATE OF MARYLAND
DEPARTMENT OF BUDGET & MANAGEMENT
RFP KEY INFORMATION SUMMARY SHEET

Request for Proposals: **SERVICES: CUSTOMER SERVICE
TRAINING CONTRACT**

Solicitation Number: **050B7400008**

RFP Issue Date: **March 1, 2017**

RFP Issuing Office: **DEPARTMENT OF BUDGET & MANAGEMENT**

Procurement Officer: **Pam Malech
45 Calvert Street, Room 138
Annapolis, MD 21401
Phone: 410.260.7338 Fax: 410.974.3274
e-mail: pam.malech@maryland.gov**

Contract Manager: **Joy Epstein
45 Calvert Street, Room 143
Annapolis, MD 21401
Phone: 410.260.7570 Fax: 410.974.3274
e-mail: joy.epstein@maryland.gov**

Proposals are to be sent to: **DEPARTMENT OF BUDGET & MANAGEMENT
45 Calvert Street, Room 138, Annapolis, MD 21401
Attention: Pam Malech**

Pre-Proposal Conference: **March 15, 2017, 1:00 p.m. Local Time
Governor's Office of Performance Improvement
First Floor, Conference Room A
100 Community Place, Crownsville, MD 21032**

Proposal Due (Closing) Date and Time: **Thursday, April 6, 2017 ~~March 30, 2017~~, 4 p.m. Local Time**

MBE Subcontracting Goal: **20 %**

VSBE Subcontracting Goal: **5 %**

Contract Type: **Indefinite quantity with fixed unit prices**

Contract Duration: **Five years**

SBR Designation: **No**

Federal Funding: **No**