MARYLAND
DEPARTMENT OF
BUDGET & MANAGEMENT

LARRY HOGAN
Governor

BOYD K. RUTHERFORD
Lieutenant Governor

DAVID R. BRINKLEY
Secretary

MARC L. NICOLE
Deputy Secretary

Customer Service Training RFP
Solicitation No. 050B7400008
Questions and Answers #1
March 23, 2017

Ladies/Gentlemen**:**

This List of Questions and Answers #1, questions #1 through #25, is being issued to clarify certain information contained in the above named RFP. The Department is working on the List of Questions and Answers #2, which will be forthcoming.

No provided answer to a question may in and of itself change any requirement of the RFP. If it is determined that any portion of the RFP should be changed based upon a submitted question, the actual change may only be implemented via a formal amendment to the RFP. In this situation the answer provided will reference the amendment containing the RFP change.

Questions and Answers

1. **When are questions due?**

   There is no due date for questions. They should be submitted in a timely manner prior to the Proposal due date. It is requested that questions are submitted at least five days prior to the Proposal due date to provide the Procurement Officer time to answer the questions and distribute the answers in sufficient time for the answers to be considered in the Proposal. See RFP Section 4.3.

2. **Will task orders be evaluated on low bid?**

   No, task orders will not be evaluated on low bid. Task Orders will be awarded based upon the task order proposal that is most advantageous to the State through a Task Order RFP (TORFP).

3. **Will master contractors be able to contact agencies directly to market to them? Will they get names of agency contacts to market?**

   Master Contractors will not be given a list of State Agency contacts. When a State Agency requires Customer Service Training Services through the Master Contract, it contacts the

DBM Contract Manager to issue a TORFP to all eligible Master Contractors as described in RFP Section 2.3.1.4.

4. How many references do you need?

Three or more references are requested from customers who are capable of documenting the Offeror's ability to provide the services, per RFP Section 5.4.2.9. In order to meet the Minimum Qualifications in RFP Section 1.1, an Offeror must provide two references that collectively can attest to the Offeror's three years of experience within the past five years. These two references may be the same as two of the three references provided for RFP Section 5.4.2.9.

5. How are the MBE and VSBE goals calculated?

The Master Contract has established an overall MBE subcontracting goal of 20% and VSBE subcontracting goal of 5% collectively for all task orders issued under the Master Contract. For each individual task order, the using agency will determine the specific subcontracting goals based on an analysis of what is appropriate for the specific scope of work. Those subcontracting goals will be set out in the TORFP. See RFP Sections 4.26 and 4.27.

6. What is crime insurance? Why is limit so high?

It has been determined that the Crime Insurance stated in RFP Section 3.1.4 is not needed for the services required for the Master Contract. Therefore, this requirement for Crime Insurance will be removed via RFP Amendment #2, Item 8, issued March 23, 2017.

7. Did the RFP say an MBE can self-perform on an MBE goal up to 50% of the goal?

Yes, an MBE Master Contractor may self-perform up to 50% of the MBE subcontracting goal established for a TORFP. In order to receive credit for self-performance, an MBE prime must be certified in the appropriate NAICS code to do the work and must list its firm in the MBE Participation Schedule, including the certification category under which the MBE prime is self-performing and include information regarding the work it will self-perform. For the remaining portion of the goal, the MBE prime must also identify on the MBE Participation Schedule the other certified MBE subcontractors used to meet those goals or request a waiver if appropriate. For example, an MBE may perform 10% of a 20% MBE subcontracting goal and obtain another MBE to perform the remaining 10% of the goal. See RFP Section 4.26.1.2 and Attachment D-1A, *MBE Utilization and Fair Solicitation Affidavit & MBE Participation Schedule – Instructions*, item 7 (*Guidelines Regarding MBE Prime Self-Performance*)..

8. If the MBE is not a Master Contractor, how will they know to work with/market themselves as a subcontractor to the Master Contractors?

Because services will be provided through the award of task orders, it is best to become qualified as a Master Contractor through this RFP. However, if your firm does not meet the Minimum Qualifications in RFP Section 1, it is recommended that you submit the "State of Maryland Notice to Vendors" on page ii of the RFP (behind the title page) to let the

Procurement Officer know that your firm is not proposing because it does not meet the Minimum Qualifications, and specifically which ones, as soon as possible.

MBEs and VSBEs are encouraged to check DBM's Statewide Contracts webpage for the "Customer Service Training Task Orders" to see the status of a TORFP. All TORFPs will be published on DBM's website. MBEs and VSBEs are encouraged to attend the Pre-TOP Conference to explore subcontracting opportunities for a particular task order with Master Contractors also in attendance.

9. How do MBE Master Contractors sell themselves as subcontractors to other Master Contractors?

See answer to Question 8 above.

10. Does the State require MD MBE program or is there reciprocity with other states?

Only Maryland State Department of Transportation (MDOT)-certified MBEs may be considered to meet the TORFP MBE subcontracting goals. Information on how to become certified in Maryland can be found at: http://www.mdot.maryland.gov/newMDOT/MBE/Index.html.

11. If I am an MBE prime, can I perform half the goal in addition to the non-subcontracted portion of work?

Yes. See answer to Question 7 above.

12. If you put high rates in the Master Financial Proposal, is there any chance a task order request would not be sent to you?

No. The Master Financial Proposal determines the maximum rates a firm may propose on a given TORFP. All eligible Master Contractors will be sent all TORFPs, unless the TORFP is designated as an SBR. See RFP Section 2.3.1.4.

13. Can computer-based training be based on per user?

Based upon feedback from the vendor community, DBM will accept pricing on a per user basis. However, the using State agency may request a group price based upon the number of employees it has. Therefore, Offerors will be required to provide "group" pricing as well for the Master Contract. The Financial Proposal Form has been revised to provide both pricing scenarios. See Amendment #2, Item 15, issued March 23, 2017.

14. Can State's HUB platform be used or must Contractor use its own platform?

The State has a computer-based training platform called "The HUB" that uses the Cornerstone Learning Management System platform. The HUB is available to all State agencies; therefore, it may be utilized for specific task orders. Master Contractors may propose to use the HUB or its own platform when responding to a TORFP. The using State agency may specify its preference in the TORFP.

15. Key Personnel – What key personnel resumes must be submitted for the Master Contract?

At the Master Contract level, the only key personnel resume required is that of the Master Contract Representative. See RFP Section 2.3.6. All other key personnel will be designated and proposed at the task order level with resumes requested via the TORFP. The TORFP key personnel approved labor categories are noted in RFP Section 2.3.8.

16. Section 5.4.2.13, page 51. Do you have to submit a list of subcontractors with the Master Contract?

The subcontractors referenced in RFP Section 5.4.2.13 apply to the Master Contractors performance of its services on an ongoing basis. Subcontractors used on a regular basis as part of your firm's business model would be included in the Proposal for the Master Contract RFP. The Section is not referencing subcontractors that a Master Contractor will employ to meet requirements of specific TORFPs, for example, subcontractors engaged specifically to meet MBE and VSBE subcontracting participation goals. If a firm does not have any subcontractors with whom it routinely subcontracts and with whom it can reasonably expect to utilize during the course of the Master Contract, it would not submit a list at the Master Contract level in response to RFP Section 5.4.2.13.

17. Sections 6.2.4, 5.4.2.13. Is Economic Benefit required to be addressed in the proposal or not?

RFP Section 5.4.2.13 states the Economic Benefit Factors are not required to be addressed in the proposal. However, Economic Benefit Factors may be required in response to future TORFPs. RFP Section 6.2.4 is amended to state that this criterion is not part of the technical proposal evaluation for the Master Contract. (See Amendment #2, Item 11, issued March 23, 2017.)

18. What is the timeline for starting work under the contract?

Once DBM establishes the list of Master Contractors, any State agency may request a task order to obtain customer service training for its employees. The timeline for starting work will be identified in each individual Task Order RFP.

19. Must agencies use this vehicle? Can they use CATS Plus? Who makes sure this vehicle is used?

State agencies are not required to use this vehicle. It is not a mandatory contract. However, obtaining services through a task order under the Customer Service Training Master Contract is typically quicker and easier for an agency than conducting its own procurement. There is no guaranteed maximum or minimum amount of work under the Master Contract.

CATS Plus is a master contract issued by the Department of Information Technology for State agency purchase of information technology, consulting and technical services. The Customer Service Training Master Contract, by contrast, is dedicated exclusively to providing agencies with access to customer service training and consulting in response to the Governor's Customer Service Initiative.

DBM is the contracting agency that will manage the Master Contract and communicate to the other State agencies about this purchasing vehicle for customer service training and consulting. In addition, the Governor's Office, the Department of Commerce, and the Governor's Office of Performance Improvement will communicate with the State agencies about the Master Contract as part of the Governor's Customer Service Initiative.

20. **I would love to have considered this work because I have skilled trainers in customer services, leadership, and organizational development as a very small MBE company but we do not currently have the capacity to do the online training.**

    DBM appreciates the feedback contained in Question #20. Amendment #2, Item 4, issued March 23, 2017, will revise the scope of work to allow vendors to propose by Functional Area (FA) with classroom training being FA 1 and computer-based training being FA 2. Offerors may propose to FA 1, FA 2, or both. Firms with capabilities in one FA but not the other may offer in the one FA. TORFPs will be distributed by FA to the Master Contractors qualified in that particular FA.

21. **Please clarify the total number of references needed.**

    In Section 1.1.2, it states for two references "As proof of meeting this requirement, the Offeror shall provide with its Proposal two references that collectively can attest to the Offeror's three years of experience within the past five years in providing consultation and training in at least one of the specialty areas for customer service, employee engagement and process improvement listed in a) through e) above. For each reference, the Offeror shall provide the information listed in Section 5.4.2.9."

    And in Section 5.4.2.9, it states 3 references: "References (Submit under TAB H). At least three (3) references are requested from customers who are capable of documenting the Offeror's ability to provide the services specified in this RFP. References used to meet any Minimum Qualifications (see RFP Section 1) may be used to meet this request. Each reference shall be from a client for whom the Offeror has provided services within the past five (5) years and shall include the following information…. "

    See the answer to Question 4.

22. **Please elaborate on what the Special Status Reports should include.**
    Section 2.3.4.1 Special Status Reports to Contract Manager
    a. **"The Master Contractor shall provide Special Status Reports, as requested, to the Contract Manager at no additional cost to the State.** ***Examples of these include but are not limited to inquiries regarding services provided by the Governor's Office and inquiries during the Maryland General Assembly Sessions."***

    As noted in Section 2.2, these services are needed to support Governor Hogan's statewide customer service initiative. In order to determine the State's progress in meeting the "Customer Service Promise," there may be periodic requests to see how many State agencies have used the Master Contract to provide employee customer service training. At those times, as per RFP Section 2.3.4.1, the Master Contractors will be required to provide the

Contract Manager with special status reports showing what services they have provided through the different Task Order Awards (TOA). More than likely, these special status reports will be a recap of the reports already provided to the using State agency, but may require more details or different formatting. In most cases, the reports would be submitted electronically for distribution to the interested parties.

23. What are the special reporting requirements for the Master Contractor and for each Task Order?

See the answer to Question 22 about the special status reports. For each task order, the TOA Contractor shall provide a task order completion report to the Contract Manager in the format and with the content specified in RFP Section 2.3.4.2.

24. Please explain the levels of participants and how they are calculated. Attachment B: Financial Proposal Form.

The Financial Proposal Form establishes flexibility in pricing for different task order scenarios depending on the using agency. Because the staffing levels are different for every State agency, the different levels of participants for the training classes will provide pricing based upon the State agency's staffing level. For each TORFP, the using State agency will determine the services needed and establish which pricing scenario is required to be submitted by the Master Contractor for its Task Order Proposal (TOP) depending on the services and the number of employees.

Section A, which applies to both Functional Area 1 and Functional Area 2, requests hourly rates for each labor category. (See Amendment #2, Items 14 and 15, issued March 23, 2017.) (Requirements for each labor category are defined in the table on page 15 in RFP Section 2.3.8.) Depending on the TORFP, a Master Contractor may propose and submit in its TOP a specific number of hours by labor category needed to perform the requested services. Section A establishes the maximum hourly rates for each contract year that can then be proposed for a TORFP.

Sections B and C are alternative pricing scenarios that establish the maximum pricing on a per class or per participant basis, regardless of labor categories used. These two sections have been broken out for Functional Areas 1 and 2. For FA 1, Section B establishes rates for different participant levels for standard 4 hour blocks of classroom-based training while Section C establishes per-student rates for classroom-based training. For FA 2, Section B establishes rates for different participant levels for 1-hour blocks of computer-based training while Section C establishes per-student rates for computer-based training.
See the answer to Question 13 for additional information.

25. Please clarify what is meant by the number of participants (2.3.10, 2.3.9):

- **Aggregate?**
- **Per agency?**
- **Per request?**
- **Is there a duration of training?**
- **Per participant?**
- **Other?**

- **Is it up to 40 participants for a total amount? Is there a minimum? (i.e. Classroom 0-40, is that one section of 8 hours of training for up to 40 people? So a lump sum should be provided to cover total, regardless of true number of participants?)**

See the answer to Question 24. For each Functional Area for which an Offeror is proposing services, each cell requesting prices/rates for each scenario must be completed in the Financial Proposal Form for the Master Contract to establish the maximum pricing for the task orders. The specific number of participants and the duration of the training will be requested at the task order level and will be based upon the number of employees at the using State agency that need customer service training.