



LARRY HOGAN
Governor

BOYD K. RUTHERFORD
Lieutenant Governor

DAVID R. BRINKLEY
Secretary

MARC L. NICOLE
Deputy Secretary

AMENDMENT #1
To
REQUEST FOR PROPOSALS (RFP)
CUSTOMER SERVICE TRAINING CONTRACT
SOLICITATION NUMBER 050B7400008
MARCH 9, 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 **Pre-Proposal Conference** as follows:

Pre-Proposal Conference: **March 15, 2017, ~~10 a.m.~~ 1:00 p.m. Local Time**
Governor's Office of Performance Improvement
First Floor, Conference Room A
100 Community Place, Crownsville, MD 21032

2. Revise Section 1.2 (**Customer Service Training Curriculum**), as follows:
 - 1.2.1. 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** ~~Offerors~~ with a curriculum that is capable of computer-based deployment but **that has** ~~who have~~ never deployed **its** ~~their~~ training by computer must further provide a plan detailing how **its** ~~their~~ computer-based training would be deployed.

3. Revise Section 2.1.2 through 2.1.6 (**Summary Statement**), as follows:

- 2.1.2 State agencies requiring customer service training and consultation will obtain those services through the issuance of a Task Order Request for Proposals (TORFP). **State agency TORFPs will be issued on behalf of the requesting agency solely through DBM in accordance with the task order process outlined in Section 2.3.1.** All Offerors awarded a Master Contract as a result of this RFP (Master Contractors) will be invited to compete for the work assignment or task detailed in the TORFP unless the TORFP is designated for a Small Business Reserve (see RFP Section 4.37) or the Master Contractor is Suspended (see RFP Section 2.3.5). Under a Small Business Reserve (SBR) TORFP, only Master Contractors that are certified as small businesses will be invited to submit Proposals. (See COMAR §21.05.07.06(A) (4) and §21.11.01.04).
- 2.1.3 **The scope of a** given Task Order may **include** be a request for one-time training for a specified number of employees or a consultation engagement over an identified number of months or years, resulting in recommendations to the requesting Agency, among other possible requests for customer service and performance improvement related consulting and training services.
- 2.1.4 A ~~non-State of Maryland~~ **county, municipal, or other Maryland** government **or government** agency or **not-for-profit entity**~~non-profit organization within Maryland~~ may likewise procure customer service training and consultation from Master Contractors through the issuance of its own TORFP. (See RFP Section 2.1.8.)
- 2.1.5 It is the State's intention to obtain services, as specified in this RFP, from a Contract between **one or more** ~~the~~ selected Offeror**(s)/Master Contractor(s)** and the State. The anticipated duration of services to be provided under this Master Contract is approximately five years and is anticipated to run from approximately June 1, 2017, through May 31, 2022.
- 2.1.6 The Department intends to make multiple awards to Qualified Offerors as a result of this RFP. See RFP Section 4.9 for ~~more~~ Contract award information.

4. Revised Section 2.2 (**Background and Purpose**), first paragraph, as follows:

Governor Hogan launched a statewide customer service initiative **on June 9, 2016** ~~in June 2015~~. The initiative calls for: 1) a renewed focus on a strong service culture and employee engagement; 2) performance metrics that create accountability and drive results; and 3) training for all **S**tate employees that reinforces the principles and expectations found in the new "Customer Service Promise," which pledges that the State of Maryland will provide constituents, businesses, customers and stakeholders with services that are friendly, courteous, timely, responsive, accurate, consistent, accessible, convenient, truthful and transparent.

5. Revise Section 2.3.1.1 (**Task Order Process**), as follows:

To initiate the Task Order Process, a State Agency or other entity requesting ~~customer~~ ~~consumer~~ service training **and or process improvement** consultation services must first notify the Contract Manager of its intent to procure these services via a TORFP. 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.

6. Revise Section 2.3.2 (**Task Order Agreement Not to Exceed**), as follows:

Each TOA will establish a Not to Exceed (NTE) dollar amount. The TOA Contractors ~~must~~ **shall** monitor invoiced amounts under each TOA. When services rendered under a TOA are projected to reach 75% of the NTE dollar amount, the TOA Contractor shall give **written** notice to the TOM and the Contract Manager that the TOA is projected to reach the 75% level. In the event that the Contractor's hours rendered in completing the TOA exceed the estimated hours in its TOP on which the ~~the~~ TOA NTE amount was based, the Contractor must finish the project as specified in the TOA without additional payment.

7. Revise Section 4.26.1.2 (**Task Order Agreement**) as follows:

When a ~~TORFP~~ ~~Task Order procurement~~ has a TOA value expected to exceed \$200,000 in value, and an expected overall MBE subcontractor participation goal of twenty-three percent (23%) or higher of the total contract dollar amount, MBE subcontractor *subgoals* will be included in the TORFP if appropriate based upon the particular type of work involved in the TORFP and the number of certified MBEs per recommended minority subgroup classification available to perform the work.

Notwithstanding any subgoals established above, the TOA Contractor is encouraged to use a diverse group of subcontractors and suppliers from any/all of the various MBE classifications to meet the remainder of the overall MBE participation goal.

If the TOA Contractor for a TORFP is a certified MBE Prime Contractor, then the procuring agency may count the distinct, clearly defined portion of the work of the contract that the certified MBE performs with its own workforce towards fulfilling up to fifty percent (50%) of the MBE participation goal and up to one-hundred percent (100%) of not more than one of the MBE participation subgoals, if any, established for the contract, provided certain requirements are met, as discussed in Section 4.26.11.

Each TOA for a task order that has an MBE goal will include a liquidated damages provision in the form of Section 5 of the TOA, Attachment P.

8. Revise Section 4.26.5 as follows:

If not included with its TOP, within five (5) Business Days from notification that it is the recommended Task Order awardee/Master (~~TOA Contractor~~) or from the date of the actual award, whichever is earlier, the Master Contractor must provide the following documentation to the Contract Manager:

- a. Outreach Efforts Compliance Statement (**TORFP Attachment D-2**).
- b. MBE Subcontractor/Prime Project Participation Certification (**TORFP Attachment D-3A/3B**).
- c. If the Master Contractor recommended awardee believes a waiver (in whole or in part) of the overall MBE goal or of any applicable subgoal is necessary, the Master Contractor recommended awardee must submit a fully-documented waiver request that complies with COMAR 21.11.03.11.
- d. Any other documentation required by the Contract Manager to ascertain the Master Contractor's responsibility in connection with the certified MBE subcontractor participation goal or any applicable subgoals.

If the Master Contractor recommended awardee fails to return each completed document within the required time, the Contract Manager may determine that the Master Contractor is recommended awardee is not responsible and, therefore, not eligible for Task Order Agreement award. If the Task Order Agreement ~~Contract~~ has already been awarded, the award is voidable.

9. Revise Section 4.26.12 as follows:

With respect to Contract administration, the TOA Master Contractor shall:

- (1) Submit to the TOM by the 10th of the month following the reporting period:
 1. A Prime Contractor Paid/Unpaid MBE Invoice Report (**TORFP Attachment D-4A**) listing any unpaid invoices, over 45 days old, received from any certified MBE subcontractor, the amount of each invoice and the reason payment has not been made; and
 2. (If Applicable) An MBE Prime Contractor Report (**TORFP Attachment D-4B**) identifying an MBE Prime's self-performing work to be counted towards the MBE participation goals.
- (2) Include in its agreements with its certified MBE subcontractors a requirement that those subcontractors submit to the TOM by the 10th of the month following the reporting period an MBE Subcontractor Paid/Unpaid Invoice Report (**TORFP Attachment D-5**) that identifies the TOA ~~Contract~~ and lists all payments to the MBE subcontractor received from the Master Contractor in the preceding reporting period month, as well as any outstanding invoices, and the amounts of those invoices.
- (3) Maintain such records as are necessary to confirm compliance with its MBE participation obligations. These records must indicate the identity of certified minority and non-minority subcontractors employed on the TOA ~~Contract~~, the type of work

performed by each, and the actual dollar value of work performed. Subcontract agreements documenting the work performed by all MBE participants must be retained by the **Master** Contractor and furnished to the TOM on request.

- (4) Consent to provide such documentation as reasonably requested and to provide right-of-entry at reasonable times for purposes of the State's representatives verifying compliance with the MBE participation obligations. **Master** Contractor must retain all records concerning MBE participation and make them available for State inspection for three years after final completion of the **TOA** ~~Contract~~.
- (5) Upon completion of the **TOA** ~~Contract~~ and before final payment and/or release of retainage, submit a final report in affidavit form and under penalty of perjury, of all payments made to, or withheld from MBE subcontractors.

10. Revise Section 4.27.3 as follows:

A Master Contractor responding to a TORFP must submit a completed Veteran-Owned Small Business Enterprise Utilization Affidavit and Subcontractor Participation Schedule (**TORFP Attachment E-1**) with its Task Order Proposal (TOP) whereby:

- a. The Master Contractor acknowledges it:
 1. Intends to meet the VSBE participation goal; or
 2. Requests a full or partial waiver of the VSBE participation goal. If the **Master Contractor** ~~Bidder/Officer~~ commits to the full VSBE goal or requests a partial waiver, it shall commit to making a good faith effort to achieve the stated goal.
- b. The Master Contractor responds to the expected degree of VSBE participation as stated in the solicitation, by identifying the specific commitment of VSBEs at the time of **TOP** ~~Bid/Proposal~~ submission. The **Master Contractor** ~~Bidder/Officer~~ shall specify the percentage of **TOA** ~~contract~~ value associated with each VSBE subcontractor identified on the VSBE Participation Schedule.

If a Master Contractor fails to submit TORFP Attachment E-1 with the Task Order Proposal as required, its TOP may be rejected for award by the State as not being reasonably susceptible of being selected for award.

11. Revise Section 4.27.4 as follows:

If not included with its TOP, within five (5) Business Days from notification that it is apparent task order awardee, the Master Contractor must provide the following documentation to the Contract Manager:

- a. VSBE Project Participation Statement (**TORFP Attachment E-2**);
- b. If the apparent awardee believes a full or partial waiver of the overall VSBE goal is necessary, it must submit a fully-documented waiver request that complies with COMAR 21.11.13.07; and

- c. Any other documentation required by the Contract Manager to ascertain Master Contractor responsibility in connection with the VSBE subcontractor participation goal.

If the Master Contractor recommended awardee fails to return each completed document within the required time, the Contract Manager may determine that the Master Contractor recommended awardee is not responsible and therefore not eligible for Task Order Agreement award agreement.

12. Revise Section 4.37 (**Small Business Reserve (SBR) Procurement**) as follows:

4.37.1 Agency may designate TORFPs as a Small Business Reserve TORFPs for which award will be limited to certified small business vendors. In instances where a TORP is designated as a Small Business Reserve TORFP, only businesses that meet the statutory requirements set forth in State Finance and Procurement Article, §§14-501—14-505, Annotated Code of Maryland, and that are certified by the **Governor's Office of Minority Affairs** Department of General Services Small Business Reserve Program are eligible for award of a TORFP.

* * *

4.37.3 **Ineligible Proposals.** Under a small business reserve TORFP, a business that is not a certified small business is ineligible for award of an **SBR** TOA.

* * *

13. Revise Appendix 1 (**Abbreviations and Definitions**), items 8, 19, and 27 and add new item 36 as follows:

8. **Contractor or Master Contractor** – Each **Qualified** Offeror that is awarded a Master Contract as a result of this RFP.

19. **Not-To-Exceed (NTE)** – The dollar amount that the TOA Contractor must stop performing any services for which it would seek payment beyond. See RFP Section **2.3.2** for more information.

27. **Suspended** – ~~A~~ The status of a Master Contractor that is **not eligible to respond to and no longer able to participate in the Task Order Request for Proposal (TORFP) or participate in the TORFP** process. See as per RFP Section 2.3.5.

36. Qualified Offeror – A responsible Offeror determined to have submitted an acceptable Proposal.

Date Issued: March 9, 2017

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, ~~10 a.m.~~ 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: **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**