

## **CSMC Agency TORFP Process Check-List As of October 1, 2017**

Note: 1) **See Specifics in Document: *Task Order Preparation, Selection and Award Process for the Customer Service Master Contract (CSMC)***. Both the process document and this Agency Check-List follow the generalized process which is subject to change and adaptation per each Agency's business process or the DBM's standards and requirements. However, unless authorized by the DBM Contract Manager, the process as documented is to be utilized. For questions, please do not hesitate to contact the DBM Contract Manager.

***2) The sections in this checklist correspond to the PART sections in the Process document as indicated; however, there is no correlation to Item numbers.***

### **Corresponds to Process Document PART 1:**

1. Notify DBM Contract Manager by email ([dbm.cmo@maryland.gov](mailto:dbm.cmo@maryland.gov)) of Agency's interest in utilizing the CSMC Master Contract.
2. Obtain a SOW Outline off of DBM's website under the "Agency TORFP Process" section.
3. The Agency submits its draft TORFP SOW to the DBM Contract Manager via email above.
4. Assign a Task Order Manager (TOM).
5. Assign a Procurement Officer (PO) - (PO and TOM may be the same).
6. Determine (All this information must be noted in the SOW Outline Document where indicated—and in collaboration with the DBM Contract Manager):
  - a. MBE participation goal (Master is at 20%) and complete an *MBE Project Review* (MBE-PR) document.
    - i. Complete the MBE subgoal worksheet for any MBE goals 25% or higher.
  - b. VSBE participation goal (Master is at 5%) and complete a *VSBE Project Review* (VSBE-PR) document.
  - c. Fund source and amount of funds available.
  - d. Living Wage Tier (1 or 2).
  - e. Functional Area (1: Classroom-based or 2: Computer-based).
  - f. If Agency is a designated SBR agency per SFP 14-501(b), determine if TORFP should be a SBR TORFP.
  - g. If Non-Disclosure Agreement(s) and Confidentiality Agreements are necessary for the TORFP.
  - h. What facilities/resources will be available to the Master Contractor at the site where the training and or consulting services will be conducted.
  - i. Date/Time/Room/Location for the Pre-Task Order Proposal (Pre-TOP) Conference.
7. Complete the SOW Outline.

8. Send DBM Contract Manager a draft SOW Outline along with the completed *MBE and VSBE Project Reviews* (MBE-PR and VSBE-PR) documents to the DBM Contract Manager via email ([dbm.cmo@maryland.gov](mailto:dbm.cmo@maryland.gov)).
9. Make any edit changes as directed by DBM Contract Manager, and then give final agreement for DBM's release of TORFP to the Master Contractors.

**Corresponds to Process Document PART 2:**

10. The TOM/PO assigns an Evaluation Team and provides them with best practice instructions of *Evaluation Committee Duties and Responsibilities* (as received from DBM Contract Manager).
11. Within approximately two weeks after release of the TORFP, the TOM/PO/Agency Team hosts the Pre-TOP Conference (this information is included in the released TORFP on the Key Information Summary Sheet):
  - a. The TOM arranges for general notes (not transcription notes—unless the Agency determines that this is necessary) to be taken at the Pre-TOP Conference. Immediately after the Pre-TOP, these notes are typed and sent in email to the DBM Contract Manager.
  - b. For any questions not answered at the Pre-TOP, formulate answers and forward the questions/answers to the DBM Contract Manager in email.
12. After TOPs are due from the Master Contractors, the Agency Evaluation Team conducts the Technical evaluation phase of the TORFP.
  - a. The TOM/PO arranges for an Oral Discussion on the Technical TOP (only) with each Master Contractor who submitted a TOP.
    - i. The MC must submit in writing any final outcome(s) different than their original proposed technical solution to both the TOM/PO and the DBM Contract Manager.
  - b. Using the Excel Evaluation Tool provided by the DBM Contract Manager and based only upon the TORFP's Evaluation Criteria, provide a written evaluation of each Master Contractor/Offeror's Technical Proposal and rank the TOPs best technically qualified to least technically qualified (Rank using only numbers 1 through 17). (See instructions given with worksheet and ask DBM Contract Manager if there are any questions/concerns).
  - c. Arrange with the DBM Contract Manager to receive the Financial Offers.
  - d. Rank the Financial Offers from best (lowest) Evaluated Price to highest Evaluated price and record the outcomes in the Excel Evaluation Tool (After recording proposed price, rank using only numbers 1 through 19).
  - e. Have the DBM Contract Manager request a Best and Final Offer (BAFO) from each Master Contractor Offeror.
  - f. When received and reviewed, record the BAFO results onto the Excel Evaluation Tool.
  - g. Provide a final rank of the Master Contractor Offerors After recording BAFO price, rank using only numbers 1 through 19).
  - h. Complete the Excel Evaluation Tool.
  - i. Utilizing the information recorded in the Excel Evaluation Tool, for any TO Master Contractor that is deemed not susceptible of being selected for award and/or later requests a review (debriefing), the TOM/PO will complete a DBM CMO Review (Debriefing) Guidance form and submit to the DBM Contract Manager. (See Task

Order Preparation, Selection and Award Process for the Customer Service Master Contract (CSMC)-PART 2, Item 11.)

- i. The DBM Contract Manager arranges for the Review; however, the TOM/PO will assist the DBM Contract Manager in performing the Review.

13. Submit the TORFP Award Package to the DBM Contract Manager. (See Task Order Preparation, Selection and Award Process for the Customer Service Master Contract (CSMC)-PART 2, Item 15.)
14. Upon request by the DBM Contract Manager, the Agency PO must ensure the provision of an ADPICS entry for the awarded task order. (*See Section PART 3: ADPICS in the Award Process.*).
15. Once award notice is sent by the DBM Contract Manager to the Master Contractors and the Agency, the TOM will notify the awarded Master Contractor of the date/time/place of the upcoming TOA Kick-Off meeting.
16. Within approximately two weeks after task order award, the TOM will host the TOA Kick-Off Meeting, and begin management of the TOA. (See PART 4: Task Order Agreement.)

**Corresponds to Process Document PARTS 4 and 5:**

17. Regarding management of the Task Order:
  - a. The Agency is responsible to ensure all follow-on communication/reporting as necessary for: MBE, VSBE, SBR (if any) and Living Wage (if any) management and reporting as applicable for the term of the Task Order Agreement. The Agency is responsible for any follow-up reporting as required by statute, policy, regulations, or procedure.
  - b. As part of MBE and VSBE reporting, the TOM ensures that ADPICS is updated on a monthly basis with MBE and VSBE payment information.
  - c. The TOM keeps the DBM Contract Manager informed of any concerns or unusual circumstances relating to the TOA work.

**Corresponds to Process Document PART 6:**

18. As noted in PART 6: TOA Close-Out, the Agency provides close-out of the TOA.
  - a. Verify deliverables and Agency acceptance of each deliverable including MBE and VSBE reporting and payments (also any other reporting required for SBR, Living Wage, etc.).
  - b. Verify MBE and VSBE payment information has been recorded in ADPICS.
  - c. Process final invoice(s).
  - d. Email notice to the DBM Contract Manager of final payment to the TOA Contractor and that all deliverables and payments were completed.
  - e. Within three weeks of the end of the term of the TOA, the Agency TOM emails/faxes the DBM Contract Manager a completed *Agency Feedback Form at the Completion of an Customer Service Training Contract's (CSTC 's) Task Order Agreement* form.