

Pre-Proposal Conference for RFQ

Medical Marijuana

RFQ 6100040415

Issuing Officer: Michael Gress
Office of Administration,
Bureau of IT Procurement Services

January 6, 2017 @ 10:00 AM

Agenda

- Housekeeping
- Introductions
- Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)
- Project Background
- Proposal Requirements
- Master Information Technology Services Invitation to Qualify (IT ITQ) Contract 4400004480
- Questions Submitted
- Additional Questions

Housekeeping

- In the event of a fire drill:
 - Exit the room to the rear, continue down the hall and exit through the stairwell. On the ground floor, exit the building and assemble near the flag poles.
- Restrooms:
 - Located outside of the room to your left.
- Sign attendance register
- Provide business card
- Sign-in sheet will be posted to e-Marketplace

Introductions

Commonwealth Representatives:

- Office for Information Technology
 - Michael Gress, Issuing Officer
- Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)
 - Audrey Smith, Department of General Services, Procurement Compliance Officer
- Department of Health
 - Brian Lecher, Project Manager

Bureau of Diversity, Inclusion and Small Business Opportunities

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Request for Quote(RFQ) : Format and Template

RFQ Small Diverse (SDB) and Small Business(SB) Components:

Part I: General Information

- SDB/SB Eligibility and Program Information

Part II: Proposal Requirements

Part III: Criteria for Selection

Part IV: Work Statement

- Contractual obligations resulting from SDB/SB Submittal

Appendix F: Small Diverse Business and Small Business Submittal

Appendix G: Small Diverse and Small Business Letter of Intent

Appendix N: Model Form of Small Diverse and Small Business Subcontract Agreement

Bureau of Diversity, Inclusion and Small Business Opportunities

What do I need to know – Part I?

Program designed to encourage participation of Small Diverse (SDB) and Small Businesses (SB) in state contracting

- A small business is a business in the United States which is independently owned, not dominant in its field of operation, employs no more than 100 full-time or full-time equivalent employees, and earns less than \$7 million in gross annual revenues for building design, \$20 million in gross annual revenues for sales and services and \$25 million in gross annual revenues for those businesses in the information technology sales or service business.
- A Small Diverse Business is a DGS-verified minority-owned business, woman-owned business, veteran-owned business, service-disabled veteran-owned business, LGBT owned or disability-owned business enterprise.

Bureau of Diversity, Inclusion and Small Business Opportunities

What do I need to do – Part I?

- Consider subcontracting opportunities available for small diverse and small businesses
- Search the DGS database of SDBs and SBs and identify SDB/SB business partners for opportunities and inclusion
- Complete and submit two (2) SDB/SB Participation Submittal Forms in separately sealed envelope (1 original and 1 copy) and corresponding Letters of Intent

Bureau of Diversity, Inclusion and Small Business Opportunities

How do I find SDBs and SBs?

To search all DGS-verified SDBs and DGS-certified SBs, visit the DGS website at:

<https://www.dgs.internet.state.pa.us/SBPI/AlphaResults.aspx>

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SDB / SB Participation Submittal

REVISED: May 6, 2014

SMALL DIVERSE BUSINESS (SDB) AND SMALL BUSINESS (SB) PARTICIPATION SUBMITTAL

Project: [RFP NAME/DESCRIPTION HERE]

Proposer Firm: _____

PROPOSER INFORMATION:

Is your firm a DGS-Verified Small Diverse Business? Yes No **QUEST** (check one)

Proposer must include its "Notice of Small Business Self-Certification and Small Diverse Business Verification" indicating its diverse status to receive credit for proposing as a Small Diverse Business.

Is your firm a DGS-Self-Certified Small Business? Yes No **QUEST** (check one)

Proposer must include its "Notice of Small Self-Certification" to receive credit for proposing as a Small Business.

SUBCONTRACTING INFORMATION:

Percentage Commitment for SDB and SB Subcontracting Participation

After examination of the contract documents, which are made a part hereof as if fully set forth herein, the Proposer commits to the following percentages of the total contract value for Small Diverse Business and Small Business subcontracting participation.

Small Diverse Business Subcontracting annual percentage commitment:

_____ % (Figure) _____ Percent (Writing)

Small Business Subcontracting annual percentage commitment:

_____ % (Figure) _____ Percent (Writing)

Request for Proposal Department of General Services

REVISED: May 6, 2014

Listing SDB and SB Subcontractors

The proposer must list in the chart below potential SDBs and SBs that will be used to meet the percentage commitments provided above. Include the SDB/SB company name, designation of SDB or SB, SDB/SB Primary Contact Information, and the description service or supplies the SDB/SB will provide, percent of contract value committed, dollar value of total contract value committed, and an indication as to the Proposer's intent to utilize the SDB/SB subcontractor for contract options or renewals. Include as many pages as necessary. **Offers must also include a Letter of Intent as indicated in RFP Section II-9 for each SDB/SB listed.**

SDB/SB Name	SDB or SB	Primary Contact Name & Email	Description of Services or Supplies to be provided	% of total Contract Value Committed	Estimated \$ value of Commitment	Will SDB/SB be used for options/renewal? (yes/no)

Request for Proposal Department of General Services

Bureau of Diversity, Inclusion and Small Business Opportunities

SDB / SB Letter of Intent

APPENDIX N

SMALL DIVERSE AND SMALL BUSINESS LETTER OF INTENT

[DATE]

[SDB/SB Contact Name]

Title

SDB/SB Company Name

Address

City, State, Zip]

Dear [SDB / SB Contact Name]:

This letter serves as confirmation of the intent of [Offeror] to utilize [Small Diverse Business (SDB) or Small Business (SB)] on RFP [RFP number and Title] issued by the [Commonwealth agency name].

If [Offeror] is the successful vendor, [SDB or SB] shall provide [identify the specific work, goods or services the SDB/SB will perform, and the specific timeframe during the term of the contract and any option/renewal periods when the work, goods or services will be performed or provided].

These services represent [identify fixed numerical percentage commitment] of the total cost in the [Offeror's] cost submittal for the initial term of the contract. Dependent on final negotiated contract pricing and actual contract usage or volume, it is expected that [SDB or SB] will receive an estimated [identify associated estimated dollar value that the fixed percentage commitment represents] during the initial contract term.

[SDB/SB] represents that it meets the small or small diverse business requirements set forth in the RFP and all required documentation has been provided to [Offeror] for its SDB/SB submission.

We look forward to the opportunity to serve the [Commonwealth agency name] on this project. If you have any questions concerning our small diverse business commitment, please feel free to contact me at the number below.

Sincerely,

Acknowledged,

Offeror Name

Title

Company

Phone number

SDB or SB Name

Title

Company

Phone number

Bureau of Diversity, Inclusion and Small Business Opportunities

What do I need to know – Part III?

Raw score will be calculated by crediting commitments to SDBs at 67% of total available points and adding commitments to SBs at 33% of total available points.

SDB/SB Raw Score =

TOTAL POINTS $(\frac{2}{3} \times \text{SDB}\% + \frac{1}{3} \times \text{SB}\% + \frac{1}{3} \times \text{SDB}\%)$

Simplified to: $200 (\text{SDB}\% + (\text{SB}\% \times \frac{1}{3}))$

- SDBs are already qualified as a SBs, therefore SDB Proposers are eligible to receive 100% of the SDB/SB points
- Proposers who indicate subcontracting commitments to SDB/SBs will be credited in accordance with percentages proposed
- Proposer submitting the highest scoring SDB/SB Participation Submittal will receive all available points, with other Proposers' raw scores adjusted pro rata

Bureau of Diversity, Inclusion and Small Business Opportunities

How is the SDB/SB Submittal Scored?

Scoring Examples:

Scenario	Score
<u>Proposer 1:</u> SDB Prime • 100% SDB Score = $200(1 + (1/3 \times 0))$	200 points
<u>Proposer 2:</u> SB Prime, with SDB Commitment • 100% SB; 15% SDB Commitment Score = $200(.15 + (1/3 \times 1))$	96.67 points
<u>Proposer 3:</u> Non-SDB/SB Prime, with SDB/SB Commitments • 15% SDB Commitment; 10% SB Commitment • Score = $200(.15 + (1/3 \times .10))$	36.67 points

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What do I need to know – Part IV?

- Contract commitments made to SDBs/SBs become contractual obligations upon contract execution.
- Selected Proposer must submit a final, executed subcontract for each SDB/SB named within 30 days of contract execution.
 - SDB/SB subcontractors must perform 50% of the work subcontracted to them
 - If subcontract cannot be achieved, Selected Proposer must notify BDISBO
- Individual percent commitments cannot be altered without written approval from BDISBO.
- All SDB/SB commitments must be maintained if the contract is assigned to another prime contractor.
- Selected Proposer must complete quarterly utilization reporting, tracking progress in meeting commitments.
- Selected Proposer must contact BDISBO if circumstances arise that may affect the ability to comply with contract commitments.

Bureau of Diversity, Inclusion and Small Business Opportunities

What's New?

- Consideration for and inclusion of Small Businesses as prime contractors and subcontractors in addition to Small Diverse Businesses in scoring
- Simple, consistent template form for SDB/SB submittal supported by executed Letters of Intent
- DGS issued SDB/SB certificate not required with submittal

Bureau of Diversity, Inclusion and Small Business Opportunities

Contact Information

Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)

Telephone: (717) 783-3119

Audrey Smith, Procurement Liaison

E-Mail: audresmith@pa.gov

Curtis Burwell, Procurement Compliance

E-Mail: Cburwell@pa.gov

Project Background

Medical Marijuana

Brian Lecher

Project Manager

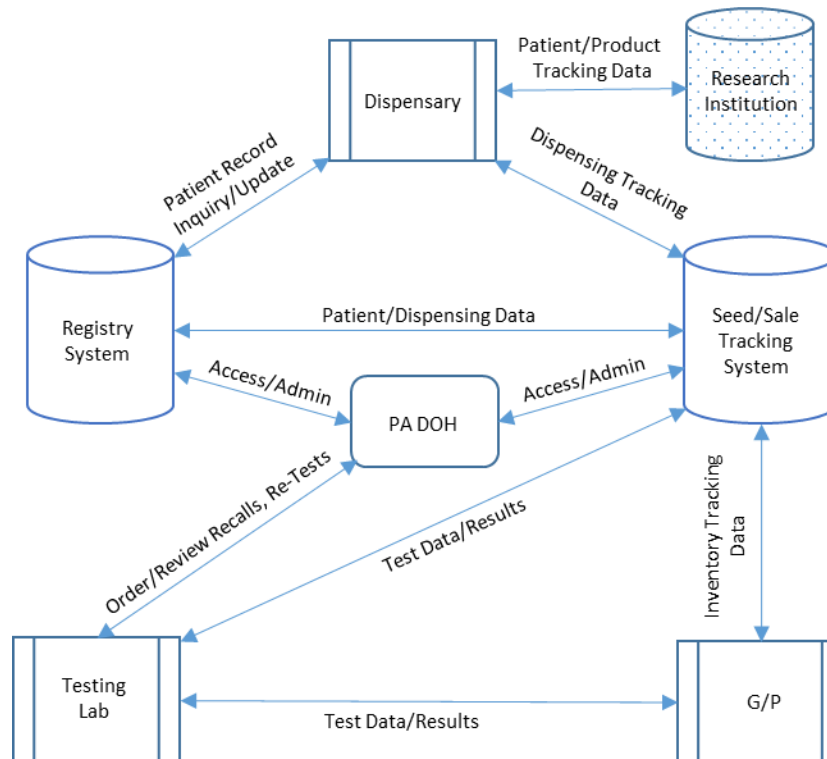
Department of Health

Project Background

- Act 16 of 2016 permits the use of medical marijuana by Pennsylvania residents who are certified as having one or more of the 17 serious medical conditions listed in the Act
- System requirements were developed from Act 16, regulations, program guidance and lessons learned/best practices employed by other states
- DOH requires a system solution with several integrated components to ensure that activities of industry participants comply with regulatory and program requirements:
 - A 'Seed to Sale' inventory tracking system to facilitate the electronic monitoring of the state's medical marijuana industry
 - An interim 'Bridge' solution to track industry cultivation and production activities prior to full-scale Seed to Sale implementation
 - Supporting 'Registry' functionality to register, approve, provide system credentials and administer patients, caregivers, practitioners and medical providers.

Project Background

-Conceptual System Overview-



Project Background

-Highlighted Objectives-

- Comprehensive, economical solution that meets the needs of the Department of Health as set forth in the RFQ work statement (Part IV)
- Single Contractor responsible for delivery and contract performance
- Turnkey model that provides all equipment (computers, point-of-sale devices, scales, label/receipt printers, 2D bar code scanners, cash registers, etc.) needed to support and integrate with the Seed to Sale and Bridge systems
- Prefer a closed Seed to Sale model: DOH, growers/processors, laboratories, dispensaries, testing labs and research institutions use a single, centralized system that supports the operational/inventory/point of sale needs of approved medical marijuana organizations and fulfills DOH regulatory tracking requirements

Project Background

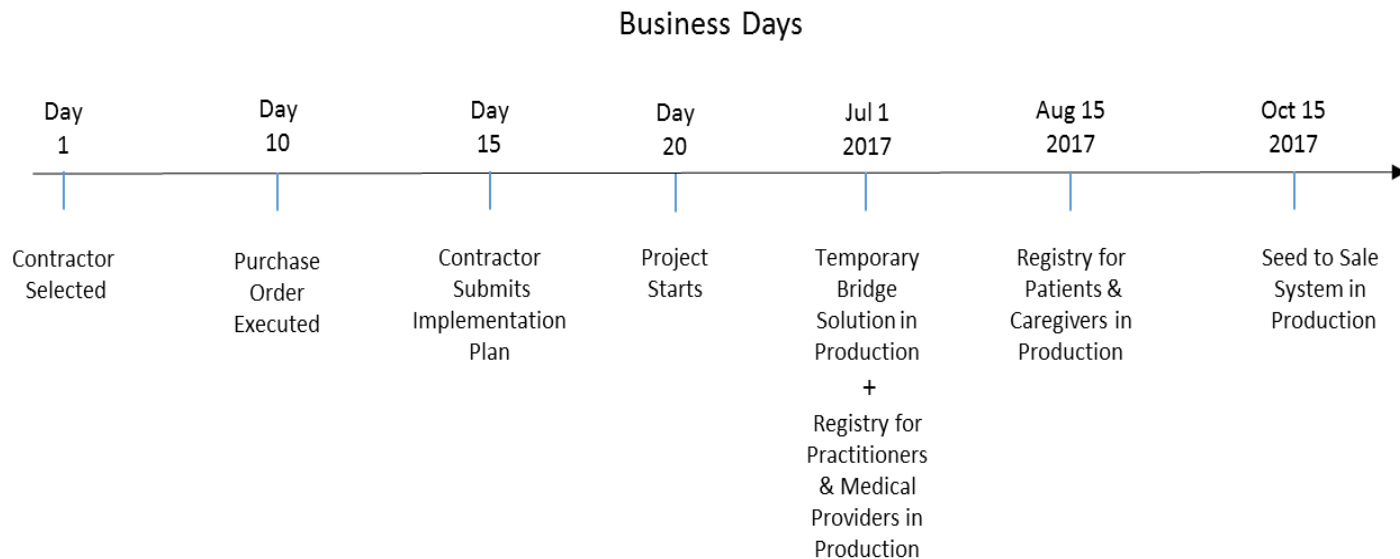
-Highlighted Objectives-

- Hosted Software as a Service (SaaS) on a FedRAMP-certified platform
- Flexibility and scalability to quickly support changing requirements and program growth
- Real time recording and processing of system information
- Strong controls to ensure the privacy of information and the security of data
- Demonstrated history of providing excellent technical and user support

Project Background

-Highlighted Objectives-

- Well-managed project that fulfills objectives and adheres to an aggressive implementation schedule:



Proposal Structure for RFQ

- Proposal is divided into the following three parts that must be submitted in separate individual sealed envelopes:

(III-4. A-C. Evaluation Criteria)

- Technical Submittal = **50%** of total points
 - Cost Submittal = **30%** of total points
 - Small Diverse Business (SDB) Submittal = **20%** of total points
- Bonus Points:
 - Domestic Workforce Utilization(**III-4. D Appendix I**) The maximum points available for this is **3%**

Proposal Structure for RFQ

- To minimize delays in proposal evaluation and to avoid rejection of your proposal, read the RFQ carefully and submit a complete proposal.
- Follow as completely as possible the proposal format given in **Part II Proposal Requirements** of the RFQ; this will aid the evaluation process.
- The evaluation will be based on what is submitted.
- Provide as much detail as possible in response to all requirements in the RFQ.

Proposal Requirements for RFQ

- Each Contractor must provide the following: [**Section I-13 Proposals, pg. 5**]
 - **One (1)** paper copy of the Technical Submittal
 - **Two (2)** paper copies of the Cost Submittal
 - **Two (2)** paper copies of the Small Diverse Business (SDB) Submittal
 - **Two (2)** complete and exact copies of the entire proposal (Technical, Cost and SDB Submittals, along with all requested documents) on CD-ROM or Flash drive in Microsoft Office or compatible format.
 - Provide **One (1)** electronic copy of a redacted version of the entire proposal, in a separate folder on the CD or Flash Drive submittal.

(Reference Part I, Section I-15 Proposal Contents C. Public Disclosure. Appendix C, Trade Secret/Confidential Proprietary Information Notice to this proposal).

Proposal Requirements Continued RFQ

- **Mandatory Responsiveness Requirements (Part III Section III-1 A. B. C.)**
 - Timely received from an Contractor
 - Properly Signed by the Contractor
 - Certify that the Contractor owns a medical marijuana Seed to Sale tracking software solution and has the ability to operate it as a hosted, Software as a Service (SaaS); **See Appendix J – Mandatory Requirements Certification.**

Proposal Requirements Continued RFQ

- Additional Proposal Requirements
 - Signed by an official representative to bind the company to a contract. **Appendix B, Proposal Cover Sheet (Section I-13)** must be submitted in order for the proposal to be considered responsive.
 - The proposal must consist of **three (3)** separately sealed submittals:
 - Technical Submittal
 - Cost Submittal
 - Small Diverse Business Submittal
 - Submit proposals as outlined and referenced in **Part II Proposal Requirements.**
 - The total score for the technical submittal must be greater than or equal to **70%** of the available technical points to advance.
 - **Do not** include any cost information in your technical submittal. If your proposal includes cost information, it shall be deemed non-responsive.

Proposal Requirements Continued RFQ

- **Do not** include any assumptions in your cost submittal. [**Appendix H, Cost Matrix**]
- Prime Contractors must be pre-qualified in the service category(ies) under the Commonwealth's IT Services ITQ Contract 4400004480 by the proposal opening/due date. Reference the service category(ies) and more information regarding the IT ITQ Contract registration process [Reference pg. ii of the proposal].

Proposal Requirements Continued for RFQ

- **ADDRESS PACKAGES PROPERLY**
 - Reference Calendar of Events, pg. V.
 - **Note:** All proposals must be received by the Commonwealth Mail Processing Center. If the proposals are delivered directly to 506 Finance Building, your proposal will not be accepted.
 - Include RFQ Number – 6100040415
 - Number Multiple Packages (i.e. 1 of 3, 2 of 3, etc.)
 - Must be Sealed
 - Allow time for delivery

Calendar of Events for RFQ

<p>Answers to Potential Contractor questions posted to the DGS website (http://www.emarketplace.state.pa.us) no later than this date.</p>	<p>Issuing Office</p>	<p>Thursday January 12, 2017, by 4:00 PM EST</p>
<p>Please monitor the DGS website for all communications regarding the RFQ.</p>	<p>Potential Contractors</p>	<p>Ongoing</p>
<p>Sealed proposal must be received by the Issuing Office at: Michael Gress, Bureau of IT Procurement c/o Commonwealth Mail Processing Center 2 Technology Park (rear) Attn: IT Procurement 506 Finance Harrisburg PA 17110</p> <p>Note: Hand-delivered proposals must be delivered to the address set forth in the Calendar of Events and must be time and date stamped by the facility receiving the proposals. Proposals may only be hand-delivered between 6:15 a.m. and 2:15 p.m., Monday through Friday, excluding Commonwealth holidays.</p>	<p>Contractors</p>	<p>Friday January 27, 2017, by 1:00 PM EST</p>

Proposal Delivery Address for RFQ

Sealed proposal must be received on or before **Friday, January 27, 2017 by 1:00 pm EST** to the Issuing Office at the following address:

**Michael Gress, Bureau of IT Procurement
c/o Commonwealth Mail Processing Center
2 Technology Park (rear)
Attn: IT Procurement 506 Finance
Harrisburg, PA 17110**

Note: Hand-delivered proposals must be delivered to **Commonwealth Mail Processing Center, 2 Technology Park (rear)**, and must be time and date stamped by the facility receiving the proposals. Proposals may only be hand-delivered between 6:15 a.m. and 2:15 p.m., Monday through Friday, excluding Commonwealth holidays. The Issuing Office will not accept proposals that are hand delivered to 506 Finance Building.

IT Services ITQ Contract 4400004480

This is a restricted solicitation, only those contractors qualified in the following service category(ies) under the Commonwealth's Information Technology (IT) Services Invitation to Qualify (ITQ) Contract, [4400004480](#), prior to the bid opening date may respond.

- **Commercial Off-The-Shelf (COTS) Software Services**
- **Modifiable Off-The-Shelf (MOTS) Software Services**
- **Subscription Based Web Application Services or Software as a Service (SaaS) Procurements**

Organizations interested in doing business with the Commonwealth through this contract **must first be registered as a Commonwealth Supplier**. For more information about registration, please view the [Registration Guide](#).

IT Services ITQ Information

Once an organization is registered with the Commonwealth, they must develop and submit a bid along with all supporting documentation through the [PA Supplier Portal](#) website in order to qualify for the service category associated with this contract.

The Commonwealth will evaluate the bid along with all supporting documentation to determine whether the organization meets the minimum eligibility requirements. Suppliers must also complete and submit additional required documentation as specified in Part II – Proposal Requirements for their proposal to be considered as being complete and responsive.

IT Services ITQ Information

- **Starting the Qualification Process**
- Log On to the [PA Supplier Portal Website](#) (top right-hand corner of the page)
 - If you have issues logging into the PA Supplier Portal Website please contact the Supplier Help Desk at (877) 435-7363, select option #1 and speak to an agent who can assist in troubleshooting the issue.
- Click on the Bidder tab (top left-hand corner of the page)
- Click on the Enterprise Applications link (left side of the page)
 - If you receive an error or if your screen appears blank please contact the Supplier Help Desk at (877) 435-7363, select option #2 and speak to an agent who can assist in troubleshooting the issue.
- Click on the ITQ Proposal Administration link.
- Click on the Proposal button.
- Click on the drop down menu and select Create New.
- Click View for the appropriate ITQ contract.
- After you have reviewed Part I-IV scroll to the bottom of the page, then click on the Select this ITQ button.
- Complete all required Steps and submit your proposal.
 - Please note that you will not be able to submit your proposal until all of your references have completed the Client Reference Survey Form.

IT Services ITQ Information

- **View Parts I – IV of the Master IT Services ITQ Contract 4400004480**

[Part I - Statement of Work](#)

[Part II - Bid Requirements](#)

[Part III - Open Enrollment Process](#)

[Part IV - Terms & Conditions](#)

For more information about the Commonwealth's Invitation to Qualify contracts and their policies, please visit the [ITQ Website](#)

ITQ Administrator Contact Information

Any questions pertaining to the Commonwealth's Information Technology (IT) Services Invitation to Qualify (ITQ) Contract, [4400004480](#) or to learn how to qualify for the ITQ, please feel free to contact:

Joseph M. Millovich

ITQ Administrator

Telephone: 717-214-3434

Email: jmillovich@pa.gov

Questions & Answers (Q&A)

- **Questions**

- All additional questions must be written on the Additional Questions sheet provided.
- All Q&A will be posted to the DGS PA e-Marketplace website:
<http://www.emarketplace.state.pa.us>
- **The Q&A final document will become official when posted to the DGS PA e-Marketplace website.**

Thank you for attending today's
Pre-proposal conference.