MCEC RFP: SOLAR FOR ALL (SFA) CRM AND GRANT MANAGEMENT SOFTWARE

Questions and Answers – March 20, 2025

MARYLAND CLEAN ENERGY CENTER

1. **Reference: N/A**

   Question: Is MCEC leaning toward a certain platform

   Answer: MCEC doesn't have CRM solution yet, so we are looking at all types. There is a lot of flexibility, and any solutions are welcome. We are also looking for a custom solution in the long term, past the term of Solar for All.

2. **Reference: N/A**

   Question: What system is currently being used at MCEC?

   Answer: None.

3. **Reference: N/A**

   Question: Who is responsible for program design and implementation services? Will you be engaging a separate vendor?

   Answer: Damion Trasada and the SFA team can help with design. The coding would be done by implementers.

4. **Reference: N/A**

   Question: -and implementation services? Will you be engaging a separate vendor?

   Answer: MCEC is responsible for program design. Currently, we are working on an RFP for implementation services.

5. **Reference: N/A**

   Question: Is there an anticipated launch date for the platform (presumably near the program launch date)

   Answer: We are looking at a 3–6-month timeline.

6. **Reference: N/A**

   Question: How many internal team members would be using this system across the different functions within MCEC? How many approximate stakeholders, customers (external) would access?

   Answer: The core SFA team is smaller, but we have approximately 20 members right now, and are looking to add more in the future. For subrecipients we have 17 and will be adding local governments- approx. 30 altogether.

7. **Reference: N/A**

Question: Will the primary users be subrecipients or homeowners?

Answer: MCEC SFA team and subrecipients are the main users who are required to use it for EPA to report key data for compliance. Homeowners will use it to apply to see if they qualify.

8. **Reference: N/A**

Question: Will this need to integrate with other MCEC systems, or will this be its own designated system?

Answer: It will need to integrate with some type of procurement tool that we have not chosen yet.

9. **Reference: N/A**

Question: Contractor management should be included? Solar installers?

Answer: Subrecipients will choose from a qualified pool of contractors. Some type of basic management would be ideal for the platform to have.

10. **Reference: N/A**

Question: Is there flexibility in the 5-year pricing estimate?

Answer: The SFA program runs for 5 years, and reporting will be required for longer but there is flexibility on the pricing term.

11. **Reference: RFP Location 4.1.12.**

Question: MBE - Maryland only? Federal Acceptable?

Answer: There is a waiver process if you don't meet the qualifications or 30%

12. **Reference: 3.2 Required Services, Scope of Work, 3.**

Question: The RFP discusses tracking outreach and engagement activities. Is this RFP only to cover the tracking of these activities? Who would be performing the outreach and engagement?

Answer: We are tracking installations as well as technical assistance that will need to be tracked. Workforce training as well as education will need to be tracked.

13. **Reference: N/A**

Question: Other state recipients have procured a separate services vendor to support the management of the grant (reporting, compliance) separate from a technology platform vendor. Does Maryland intend to leverage MCEC staff for program management or engage a support vendor who would then help to interface with the tech platform?

Answer: The MCEC SFA team will complete these tasks.

14. Reference: 3.2 Required Services, Scope of Work, 7.

Question: Could you please elaborate on the Finance section of the RFP?
a. Portfolio Management
b. Investor Reporting & Assurance
c. Capital Planning & Intelligence
d. Origination & Underwriting

Answer: We are looking for something that can speak to the guidelines that SFA has so we are in compliance, and we want to monitor that. It should be flexible and able to align with origination and underwriting.

15. Reference: N/A

Question: With limited time after questions submitted and the time likely need to answer, is there any flexibility on the 4/8 deadline?

Answer: Due to the grant timeline we need to adhere to the current schedule.

16. Reference: N/A

Question: Is there broad budgetary guidance you can provide?

Answer: We always strive for budget consciousness but are aware the software is complex and needs to meet many requirements.

17. Reference: 4.1.12. b

Question: How would MCEC like to receive the Certified MBE solicitation that is due 10 days before the proposal is due? Email to Holly Mays or something different?

Answer: Yes, send to Holly Mays at hmays@mdcleanenergy.org 10 days prior to the proposal due date for *subcontractor* submissions.

18. Reference: 4.1.12

Question: Regarding the Solicitation of the Certified MBEs that is due “at least 10 days before bids or proposals are due” – is this 10 business days (due by March 25) or 10 days (due by March 29th)?

Answer: This only pertains to service providers who are seeking bids from subcontractors. Nothing is due to MCEC before service providers are to submit their proposals to MCEC for this RFP.

19. Reference: N/A

Question: MCEC mentioned that they envision about 20 users, and that they would like to have different levels of user permissions available to be utilized across the entire organization. Can you describe how many distinct individuals would be directly engaged in the following activities? (Excluding MCEC staff that only need oversight or collaborative capabilities and focusing on individuals that need to be directly executing these workflows on a daily basis)

- Origination, Reviewing Applications, Diligence, Underwriting
- Ongoing Financial/Portfolio Management
- Reporting & Compliance

Answer: For the first two bullet points, zero. For reporting and compliance all the subrecipients so this would be ~30.

20. Reference: 3.2 Required Services, Scope of Work: Software Requirements 10. a

Question: Regarding #10a in the Scope of Services: "Support tracking system to manage customer requests." Can you explain who is defined as "customer" in this case? And if possible, please provide examples of what kind of requests MCEC would like to track.

Answer: The customer is the person who has applied for services that Solar for All offers. The customer may have a complaint or an issue with their solar project and want to talk to someone about it. An example would be my roof is leaking, and the subcontractor is not answering my phone calls. They would submit a case and then the MCEC team would receive it, review the case, resolve it and let the customer know the final resolution. I would look at this as a case management support system.

21. Reference: N/A

Question: How many Internal users? And how many departments?

Answer: The core SFA team is smaller, but we have approximately 20 members right now and are looking to add more in the future. We have 7 departments.

22. Reference: N/A

Question: Do you have visibility issues between users, like certain groups/departments have certain permissions? Do you have any known internal security requirements?

Answer: Use typical profile for a quasi-state agency regarding permissions and security requirements. Additionally, there is a cybersecurity requirement by the EPA that must be met to ensure data is secure.

23. Reference: N/A

Question: How many grants programs do you have?

Answer: 4 currently, 1 foundational, 1 subrecipient role through DNR from Federal and 2 federal CFI 1A and SFA.

24. Reference: N/A

Question: Are your grants public application, invite only, or a mix of both? How do you select grantees if invite-only? If you invite grantees to apply, what does your grantee pipeline process look like?

Answer: This is confusing—we don't always issue grants (maybe in the future) but for the SFA program we will have individuals applying for solar funding—some grant, some loan, some strategic financing. We don't currently have a pipeline of applicants.

25. Reference: N/A

Question: Do you use multiple currencies/give grants in multiple currencies?

Answer: No, only USD.

26. Reference: N/A

Question: Do you have external reviewers who need to access the applications for reviews?

Answer: Yes, customers who apply for the different services.

27. Reference: N/A

Question: Do you need batch reviews of applications?

Answer: Yes, that would be helpful.

28. Reference: N/A

Question: What does your due diligence process look like?

Answer: More information is needed to provide the best answer.

29. Reference: N/A

Question: Do you have a form tool for your applications already?

Answer: No.

30. Reference: N/A

Question: Do you have an established theory of change or logic model?

Answer: No.

31. Reference: N/A

Question: How are you currently tracking outcomes? Do you have samples you can provide?

Answer: Excel and Smartsheet. We prefer to share once we have chosen a winner. NOFO of SFA should give you an idea of what we are tracking.

32. Reference: N/A

Question: How are you collecting outcomes from your programs/participants?

Answer: This process has not started yet. The goal will be that the software platform provides this capability.

33. Reference: N/A

Question: Are you using any survey tools/form tolls for collecting outcome data? Do you want them integrated with your CRM?

Answer: No and yes, that would be great.

34. Reference: N/A

Question: Are you looking to use other data inside Salesforce such as Fundraising data as part of your outcomes data?

Answer: No.

35. Reference: N/A

Question: Do you need to disaggregate data?

Answer: Potentially yes.

36. Reference: N/A

Question: What are the data sources?

a. How many tables/objects in each source?
b. Are the data sources relational?
c. Is there overlap between the data sources (i.e. same individual found in multiple sources)?
d. Can the client extract the full dataset?

Answer: We don't know at this point how many. This can be discussed during design and implementation of the platform. As for the other questions, yes, yes and no.

37. Reference: N/A

Question: What is the data volume in your current system(s)?

a. Will all of those records need to be migrated or will certain records be excluded?
b. If not all records will be migrated, does the client require archiving and/or aggregated data points?

Answer: No data needs to be migrated and no on the second question.

38. Reference: N/A

Question: On a scale of 1-10 (1 being poor, 10 being fabulous), what is the quality of the data in terms of cleanliness (i.e. duplicates, invalid email addresses, ill-formatted data types, etc.)?

a. If data cleansing is desired, what areas need the most cleanup? Can the client easily identify dirty data and/or provide criteria for isolating?

Answer: N/A because no data will be imported into the new system.

39. Reference: N/A

Question: Are there files/attachments that need to be migrated?

Answer: No

40. Reference: 3.2 Required Services, Scope of Work 1. b.

Question: Compliance Management - Can you provide an example of how this is accomplished now, and the pain points you have around it?

Answer: We use Smartsheet and excel. It is not efficient enough for the long-term.

41. Reference: N/A

Question: Can you provide examples of key metrics for outreach, technical assistance and workforce development?

Answer: Key workforce metrics are: # of classes, # of trainees per class, # of graduates, # of certifications, # of jobs obtained after graduation, New Job salary, trainee location, etc...

Key outreach metrics are: # of events, # of attendees, # of signups, event location, attendee location, etc...

42. Reference: 3.2 Required Services, Scope of Work 8.

Question: Can you describe what is involved in the eligibility review process?

Answer: We need to:

- Qualify income by receiving and reviewing documentation such as bank statements, pay stubs, utility bills, etc...
- Income Attestation
- Confirm homeownership (mortgage statements)

- Confirm homeowners' insurance
- Confirm address
- From the review, make a final decision on whether they qualify or not for the SFA program and let the customer know of the final outcome.

43. Reference: 3.2 Required Services, Scope of Work 10.

Question: On page 15, you mention needing a case management support tracking system. Do support requests come in through a web page, email, and/or phone calls?

a. How many support requests does MCEC receive on a monthly basis?

Answer: Customers cannot apply yet so there are no initial cases yet. The only way people can submit a case right now is via a phone call or email. However, once SFA gets going, we need a system to manage the cases. We assume 20 to 50 cases per month.

44. Reference: N/A

Question: Does MCEC know of any must have integrations

Answer: Procurement and Accounting Software solutions

45. Reference: N/A

Question: Who is MCEC's cloud service provider (if any)?

Answer: OneDrive

46. Reference: 3.2 Required Services, Scope of Work 5.

Question: What are you envisioning for the customizable reporting dashboards?

Answer: The dashboard should show how we are doing on key milestones and metrics for the 4 areas (workforce, technical assistance, technical assistance and funding / financing (single home, multifamily and community solar) as well as any upcoming key reporting deadlines.

47. Reference: N/A

Question: What types of entities would be considered an investor?

Answer: Individuals or corporate entities that have provided financial assistance.

48. Reference: N/A

Question: Does Maryland CEC utilize an existing CRM and an event campaign service? If so, which ones?

Answer: No and no.

49. Reference: N/A

Question: What is your infrastructure hosting expectation and requirements, if any?

Answer: Needs to meet cybersecurity requirements by the EPA. Otherwise, no additional expectations nor requirements. We assume any industry standard platform will meet general requirements.

50. Reference: N/A

Question: Will a demo be required for orals/interview?

Answer: A demo may be requested depending on the number of qualified bids received.

51. Reference: N/A

Question: Will interviews be in person or are there virtual options?

Answer: Virtual is preferred.

52. Reference: N/A

Question: Has MCEC finalized how income will be reviewed and which documents will be required?

a. If using IRS tax transcripts:

Will applicants provide them directly, or will the administrator request them?

How should income be determined for non-filers? Will additional documents (e.g., W-2s, bank statements) be required?

Should we plan for associated functionality such as document slots, email templates, and applicant prompts?

Answer: See question 42. Applicants will upload key documents to the platform. Yes, and yes on the last two questions.

53. Reference: N/A

Question: If using income attestation, will a standardized attestation form be required, and should the vendor design it?

Answer: It will be requested and no the vendor does not need to design it.

54. Reference: N/A

Question: If requiring direct financial documents (W-2s, pay stubs, bank statements):

Will MCEC provide sample documents and field definitions, or should the vendor define those?

Should document handling, field validation, and communication templates be part of the proposal?

Answer: MCEC will provide samples and yes to the 2nd question.

55. Reference: 3.2 Required Services, Scope of Work 8.

Question: Will the full household be required to complete income verification or just the applicant?

a. Will CSE need to develop a household summary form, or should that be embedded in the main application?
b. Please clarify how MCEC defines a "household" — is it limited to family members, or does it include roommates/other residents?
c. Should income be verified for dependents and minors?

Answer: Just the applicant but # of household members is required. We can provide more detail once a winner has been chosen.

56. Reference: N/A

Question: Is the selected vendor expected to provide white-glove onboarding and training for subrecipients and external users as well?

Answer: No just the internal team.

57. Reference: N/A

Question: Will the system need to manage applications for the three distinct Solar for All program types separately (e.g., single-family, multifamily, and community solar)?

Answer: It can be discussed what makes most sense once a winner has been chosen.

58. Reference: N/A

Question: If yes:

- Will community solar require ongoing subscription management? Or will this be handled by third-party subscription managers?
- For multifamily projects, should the system support both master-metered and individually metered properties?
  - If so, should it calculate savings using multiple methods (e.g., kWh savings vs. value-add services like Wi-Fi)?

Answer: Community solar will be taken care of by a third-party subscription service. This platform does not need to handle it. Regarding the second question, we are not sure yet. It is worth a discussion once a winner has been chosen.

59. Reference: N/A

Question: Will the system need to integrate grants with loan products?

Answer: Ideally yes, though this can be discussed once a winner has been chosen.

60. Reference: N/A

Question: Who is expected to submit applications in the system?

- Will residents, contractors, property owners, and/or developers have access?
- Should the interface support multiple user roles and permission levels accordingly?

Answer: Residents. The other stakeholders mentioned would be working closely with the subrecipients. And yes, on multiple user roles and permission levels.

61. Reference: N/A

Question: Are there preferred hosting environments (e.g., cloud, on-premise, etc.)?

Answer: 100% On-cloud

62. Reference: N/A

Question: Are there any specific data residency requirements (e.g., must data remain in Maryland or the U.S.)?

Answer: Only for MD residents.

63. Reference: 3.2 Required Services, b. Requirements i.1.

Question: Can MCEC share the "Cybersecurity Audit Requirements.pdf" referenced in the RFP?

Answer: Yes. Link is here: Cybersecurity Audit Requirements.pdf

64. Reference: N/A

Question: Does MCEC prefer a single unified platform, or will it consider an integrated solution using best-in-class tools?

Answer: We are open to the best solution.

65. Reference: N/A

Question: Are there existing systems or tools (e.g., accounting, CRM, marketing automation) that the solution must integrate with?

Answer: Not at this time, but in the future potentially a procurement and upgraded accounting software.

66. Reference: N/A

Question: How does MCEC plan to manage outreach and education for stakeholders and potential applicants (distinct from application intake)?

Answer: MCEC will manage the subrecipients who do outreach and education but not necessarily their outreach activities. We will need to know and record their key metrics via the system.

67. Reference: N/A

Question: Would you be open to having your vendor manage marketing and outreach activities, assuming they use an email platform with tracking capabilities?

Answer: This is out of the scope of the RFP.

68. Reference: N/A

Question: Would MCEC consider placing an email signup form on its website to feed into a vendor-managed marketing platform for ongoing engagement?

Answer: This is out of the scope of the RFP.

69. Reference: N/A

Question: Will MCEC consider a modular or phased implementation that prioritizes MVP functionality with future enhancements?

Answer: Yes.

70. Reference: N/A

Question: Is there a defined or anticipated budget range or ceiling for this procurement?

Answer: We always strive for budget consciousness but are aware the software is complex and needs to meet many requirements.

71. Reference: 4.1.12

Question: Can you provide the following documents referenced in the RFP?

- Attachment D-1A (MBE Utilization & Fair Solicitation Affidavit)
- Attachment D-1B (Waiver Guidance)
- Attachment D-1C (Good Faith Efforts Documentation)

Answer: These can be found by clicking the link to MBE Forms in the RFP under section 2.22 b.

72. Reference: N/A

Question: Will a recording of the pre-bid meeting be made available?

Answer: No, the pre-proposal meetings are not recorded.

73. Reference: N/A

Question: Can MCEC share the list of pre-bid meeting attendees?

Answer: No.

74. Reference: 3.2 Required Services, b. Requirements i.3

Question: Can you clarify the expectations regarding the level of interaction expected with ALPHA Engineering Associates?

Answer: Since they are our IT support, there may be some interaction on integrating emails and our website. Otherwise, interaction should be limited.

75. Reference: N/A

Question: Will ALPHA Engineering Associates be eligible to bid on this RFP?

Answer: Yes.

76. Reference: N/A

Question: Is there an incumbent vendor providing custom software development services for MCEC?

Answer: No.

77. Reference: N/A

Question: Is MCEC using existing software for any portions of the requirements outlined in this RFP? If so, please specify the vendor(s)/platform(s), and whether the intent is to replace or integrate with these existing tools:

- Grant Administration
- Customer Relationship Management (CRM)
- Marketing orchestration and email campaign management
- Task and Project Management
- EPA Compliance Reporting & Program Metrics
- Loan origination, servicing, and disbursement tracking
- Eligibility verification and income screening
- Reporting and business intelligence dashboards
- Case Management

Answer: No.

78. Reference: N/A

Question: Additionally, are there any systems or databases owned or maintained by the State of Maryland (e.g., income verification databases, interagency portals) that the selected vendor will need to integrate with?

Answer: No.

79. Reference: N/A

Question: Will there be an existing program or applicant data that needs to be migrated into the new system?

Answer: No.

80. Reference: N/A

Question: If yes, can you provide details on the data format, volume, and systems from which the data will be migrated?

Answer: N/A

81. Reference: N/A

Question: Will the vendor be responsible for cleansing, validating, or mapping legacy data during migration?

Answer: No.

82. Reference: N/A

Question: Does MCEC have a preference between licensing a commercial off-the-shelf (COTS) solution and developing a custom solution to meet the scope outlined in this RFP?

Answer: Looking for the best solution. We are open.

83. Reference: N/A

Question: If a custom-developed solution is required, does MCEC intend to retain full ownership of the resulting software, including source code and intellectual property?

Answer: It can be discussed what makes most sense.

84. Reference: N/A

Question: Alternatively, would MCEC be open to a subscription-based or perpetual license model for an existing, configurable tool that fulfills all functional requirements?

Answer: We are open to the best solution.

85. Reference: N/A

Question: Will MCEC consider an extension until 4/14 to allow vendors to incorporate responses to questions in their proposals?

Answer: No, we have a strict deadline.

86. Reference: 4.1 MBE Requirements

Question: Will MCEC please confirm whether prime bidders must have established partnerships with an MBE subcontractor at the time this bid is due?

Answer: No, the MBE subcontracting process is detailed in Sections 4.1.12 and 4.1.13. of the RFP

87. Reference: p 16, Section 3.2

Question: Can you provide a copy of the Cybersecurity Audit Requirements.pdf that's referenced in the RFP?

Answer: Cybersecurity Audit Requirements.pdf

88. Reference: N/A

Question: Will the Solar for All program be operated by a third-party implementation contractor? If yes, what is the timeline to onboard the IC?

Answer: No.

89. Reference: RFP Location: p 16, b. ii

Question: Do you have any internal staff to support training and change management efforts?

Answer: No.

90. Reference: RFP Location: p 15, 3.2

Question: What marketing technologies are used today? If any, can you provide a brief description of how they are used? Has MCEC determined whether the marketing requirements listed in 3.2 #9 a-l are intended to supplement or replace existing technology or does that evaluation need to be part of the proposal?

Answer:

91. Reference: RFP Location: p 15, 3.2

Question: What project management tools are used today? Can you please provide a brief description of how they are used (e.g., Are they used to capture photos or coordinate with other contractors?

Answer: None.

92. Reference: N/A

Question: Is there a timeline or target for go-live?

Answer: Go live by the end of the summer 2025.

93. Reference: RFP Location: p 16, b.ii

Question: Do you have closed network of contractors that you work with? Or is there an application process for contractors that you will work with? Can you provide a rough estimate of the number of contractors that would need change management support?

Answer: No and no.

94. Reference: RFP Location: p 4, Section 1.8

Question: To ensure we receive the correct notifications, which preferences should we subscribe to (the Business Development & Career Announcements does not appear in the list of options). We assumed procurement?

Answer: For future notifications of MCEC solicitations, please subscribe to Procurement messages. For updates regarding this RFP, email notifications will be sent to all who submitted questions or attended the pre-proposal meeting.

95. Reference: N/A

Question: Is there an updated link to the bulletin board? Link leads to a blank page: https://www.mdcleanenergy.org/resources/rfp-bulletin-board/

Answer: Yes, our website has been updated, and the bulletin can be accessed here:
News & Annoucements - MD Clean Energy

96. Reference: RFP Location: p 19, Section 5.2

Question: How are you seeking bidders to acknowledge Appendix 3? On page 7 in section 2.15, it says the Contract Affidavit does not need to be included in the RFP response; however, on page 19 in section 5.2 it mentions it must be "acknowledged"

Answer: The Contract Affidavit is not required for *proposal submission,* but is required to be completed by any firm awarded the contract.

97. Reference: RFP Location: p 14, Section 3.2, #7e

Question: What origination and underwriting tools are used today? Are these tools homegrown or commercial/off-the-shelf? To what degree is this new platform envisioned to interact with the origination and underwriting processes?

Answer: None.

98. Reference: RFP Location: p 15, Section 3.2, #8

Question: Can you describe the current state/process of low-income eligibility reviews? In current state, does this require income validation with a trusted "source of truth" entity (e.g. IRS/Dept. of Revenue)?

Answer: See question #46.

99. Reference: RFP Location: p 14, Section 3.2, #5

Question: Are any Business Intelligence (BI) tools currently in use? Does MCEC already have a list of KPIs in mind for tracking, or is this an area where Vendor input would be welcomed?

Answer: No. NOFO of SFA should give you an idea of what we are tracking.

100. Reference: RFP Location: Section 7. c

Question: Does the program anticipate outside investors participating in the program? If so, can you describe how these investors will be participating?

Answer: Yes, to either be a participant as part of a capital stack or possibly provide gap financing when necessary. MCEC will require an investor for any project that we have a shortfall in funds and may need to provide a credit enhancement to attract a partner to provide additional funds.

101. Reference: RFP Location: Section 7. c

Question: Can you describe specifically the scenarios where the software will be used to support these investors?

Answer: MCEC will need to keep track of their portion of the financing or if SFA funds are being used to leverage MCEC will want to monitor if funds are used properly. If funds are used as a Loan Loss Reserve account, there will need to be monthly reporting monitoring the amount of LLR necessary for lending as well as determining remaining LLR. If funds are used as a credit enhancement to buy down interest, MCEC will need monthly monitoring to determine how much buy down funds remain. In both cases monitoring will need to calculate the amount of funds used, amount of remaining and estimated time of funds remaining

102. Reference: RFP Location: Section 7. c. iv

Question: What will be the source of the taxable income information?

Answer: MCEC

103. Reference: N/A

Question: What will be the source of the capital contributions information?

Answer: MCEC

104. Reference: N/A

Question: Will this system need to track power production?
a. If so, how often will power production need to be read, i.e. daily, monthly, annually?
b. How many systems will need to have power production data read?
c. Will the system need to interface with the power producers to pull this data?
d. What system will be used to interface with the power producers?

Answer: We will use [Sunvoy] to track power production.

105. Reference: RFP Location: Section 7. d. iv

Question: Can you describe who is making the capital calls? Can you describe who is providing the capital under these capital calls? Can you describe the triggers for the capital calls?

Answer: MCEC will complete any capital calls to prospective partners involved in a deal transaction. A trigger for the calls will be MCEC cannot fully support a project and needs to bring in an outside investor to help complete the project

106. Reference: RFP Location: Section 7. 3. e.

Question: Can you verify if there is a missing section i?

Answer: There is no missing section here. There was a numbering error.

107. Reference: RFP Location: 3.2. Required Services, 7. e. iii.

Question: This section states "Streamline deal data collection from counterparties and pre-qualify deals"
1. Can you specify who the counterparties would be in this situation?
2. Can you describe what the "deals" are that will be pre-qualifying?

Answer: Any financing partner that MCEC is working with. Deals that will need to be pre-qualified are prospective projects that need to be vetted to be sure that they are in compliance and eligible for the funds

108. Reference: Section 4.1.12

Question: Can service providers still be considered by MCEC if they are in the process of obtaining the MBE certification?

Answer: Yes. MBE certification is not a requirement in order to submit a proposal. 30% overall certified MBE participation is the goal for the contract that will result from the RFP, and MCEC utilizes State of Maryland MBE forms, including their Waiver process and forms.

109. Reference: Section VI. Proposal Evaluation

Question: Will MCEC please explain the scoring methodology to be used during the evaluation process and whether MBE participation will be part of the scoring criteria?

Answer: Evaluation is calculated by weighted percentages in several categories. These are still being developed for this RFP.

110. Reference: Section 4.1.16

Question: Please clarify whether the “proposed principal Consultant” is a key person, or is it in reference to the Offeror/Proposer as Prime on the 3 referenced past performances

Answer: Yes, the key person or lead project manager should be noted as playing a leading role in the referenced project.

111. Reference: Section 5.2 Proposal Body

Question: Will MCEC please confirm offerors may provide a standalone Price Proposal Volume to include a narrative file and Excel Workbook file which are outside the 20-page limit of the separate/standalone Management and Qualifications Volume?

Answer: MCEC confirms that these files will not count toward the 20-page limit.

112. Reference: Section 4.1.12

Question: Would MCEC also consider firms certified through Maryland's Veteran-Owned Small Business Enterprise (VSBE) Program to meet MBE goals?

Answer: There are no VSBE requirements for this RFP. MCEC will not consider VSBE-certified firms to meet MBE requirements, as both programs have different requirements and serve different purposes

113. Reference: N/A

Question: Is there a need for electronic signatures, i.e. Docusign, or other signature application integration.

Answer: It would be nice to have.

114. Reference: N/A

Question: Will the system need to store Personally Identifiable Information (PII)?

Answer: Yes

115. Reference: N/A

Question: How is Direct Pay data/information expected to be stored in the system? Is it just tax payment receipts that will be uploaded?

Answer: N/A

116. Reference: N/A

Question: How many grant applications do you expect per year?

Answer: We don't need grant tracking software (meaning tracking applications, etc.) but our current KPI goal is 10 per year with a 50%-win rate (which could be strongly impacted in the current climate)

117. Reference: 2.17 Contract Award

Question: Will MCEC please clarify what conditions under which more than one award would be made?

Answer: MCEC always reserves this as an option, but we do not have specified conditions under which more than one award will be made for this procurement.

118. Reference: N/A

Question: For Offerors who will be proposing a cloud-based software solution, is it expected that the contractor will manage that Cloud environment and solution for the duration of the contract period?

Answer: Regarding support and maintenance, yes.

119. Reference: 4.1.11 Management and qualifications

Question: Will MCEC please confirm that an offeror's response to RFP pg 17, subsections 4.1.11 - 4.1.12 may be an Appendix item and therefore not included in 20-page count limit?

Answer: Confirming that this can be added as an appendix and not count toward the 20-page proposal limit.

120. Reference: N/A

Question: What is the approximate number of subrecipients for the program?

Answer: Approximately 30 altogether

121. Reference: N/A

Question: What are the existing IT systems with which the CRM and grant monitoring system will need to integrate?

Answer: It will need to integrate with some type of procurement tool that we have not chosen yet

122. Reference: N/A

Question: Approximately how many different persona/user types do you anticipate for the internal and external collaboration portals?

Answer: The core SFA team is smaller, but we have approximately 20 members right now and are looking to add more in the future. We have 7 departments. Stakeholders would be approximately 30.

123. Reference: 3.2 Required services

Question: Who are the investors

Answer: Any entity that may provide additional capital assistance or is a participant as part of a capital stack or leveraged transaction

124. Reference: Section 2.24(cd) Living Wage Requirements

Question: Will MCEC please confirm the Maryland Living Wage Requirements Affidavit of Agreement to be completed and submitted with the offeror's Qualifications submittal may be an Appendix item and therefore not included in 20-page count limit?

Answer: MCEC confirms that the Maryland Living Wage Requirements Affidavit can be submitted as an Appendix and not included in the 20-page limit.

125. Reference: Section 3, Sample Contract

Question: Will MCEC please provide the sample contract 's Compensation Exhibit A format

Answer: Exhibit A is defined in Section 1(a) of the sample contract as the Contractor’s proposal, which will be the offeror’s response to this RFP.

126. Reference: 4.2 Payment Terms

Question: Will MCEC please confirm the resulting contract's Section 3(b) Method of Payment will instead reflect RFP pg 18 Section 4.2 Payment Terms which states the intention to pay the Contractor for the full five-year term up front?

Answer: MCEC confirms that the sample contract provided as Appendix 2 of the RFP will be revised as needed to meet the specified terms.

127. Reference: 4.2 Payment Terms

Question: Will MCEC please confirm the resulting contract type for this opportunity as Firm Fixed Price (FFP)? If it will not be FFP, what type will it be?

Answer: MCEC confirms that we anticipate that the resulting contract type will be Firm Fixed Pricing. In addition, MCEC is capable of considering other contract types, provided they meet all requirements specified in the RFP.

128. Reference: 4.2.1 Payment Terms, Cost, and Sample Contract 3a

Question: Will MCEC please define/clarify what is meant by “The Rates” in RFP Section 4.2.1 and Sample Contract Section 3(a)?

Answer: MCEC clarifies that “the Rates” refers to hourly labor rates.

129. Reference: 4.2 Payment Terms

Question: Will MCEC please clarify the level of pricing detail expected to satisfy the RFP instructions laid out in Section 4.2? For example, will costs be delineated by sprint team suffice or is MCEC interested in seeing labor detail at the level of by labor category/functional role?

Answer: MCEC clarifies that we are interested in seeing labor detail at the level of by labor category/functional role.