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In the Matter of

3
DEPARTMENT OF YOUTH & COMMUNITY DEVELOPMENT

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5   CAPACITY BUILDING SERVICES:
         STRENGTHENING ORGANIZATIONS
6   PRE-PROPOSAL CONFERENCE
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             New York, New York 10007

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             February 15, 2017
11   2:11 p.m.

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             Transcript of Proceedings

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2   A P P E A R A N C E S

3   KEITH BUNCH, Assistant Deputy Agency Chief
     Contracting Officer

4
     NATASHA MAST, HHS Accelerator

5
     MERYL JONES, Assistant Commissioner

6
     MIGUEL BONILLA, Director of Organization Development

7
     ROBERT FRENZEL-BERRA, Director of Research and

8   Program Development

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2   MR. BUNCH: Good afternoon,

3   everyone. Good afternoon. Thank you for

4   your patience. I see some familiar faces

5   from yesterday.

6   Raise your hands if you went to the

7   M/WBE event yesterday.

8   (Hands are raised.)

9   MR. BUNCH: Okay great. Glad you're

10   here today. Thank you.

11   On behalf of Commissioner Chong, we

12   would like to welcome you to the Department

13   of Youth and Community Development's

14   Pre-Proposal Conference for Capacity

15   Building Services. My name is Keith Bunch,

16   Assistant Deputy Agency Chief Contracting

17   Officer.

18   So here's our agenda for today.

19   We'll have a panel introduction, RFP

20   timeline requirements. We'll be going over

21   some pre-qualifying and proposal submission

22   information from HHS Accelerator. We'll go

23   into detail about capacity building. We'll

24   go forward with RFP content areas. At the

25   end, we'll discuss post-award requirements,

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2   and then we'll have your favorite session,

3   Q&A, and you'll be able to ask the panel

4   questions regarding your RFP.

5   All right. So I'm going to

6   introduce our panel. To my right we have

7   Meryl Jones. She's the Assistant

8   Commissioner of Capacity Building. We

9   have, to her right, Miguel Bonilla. He's

10   the Director of Organization Development.

11   And to his right, we have Robert

12   Frenzel-Berra. He's the Director of

13   Research and Program Development. He will

14   be available for questions. We also have

15   Natasha Mast from HHS Accelerator. Oh,

16   she's in the back. And she'll be going

17   over pre-qualifying and proposal submission

18   for HHS Accelerator.

19   I want to thank you for joining us

20   today. Before I turn this conference over

21   to the panel, I would like to go over some

22   important dates and general information.

23   First I want to discuss with you our

24   mission here at DYCD. We, the Department

25   of Youth and Community Development, or

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2   DYCD, invests in a network of

3   community-based organizations and programs

4   to alleviate the affects of poverty and to

5   provide opportunities for New Yorkers and

6   communities to flourish. Our vision, DYCD

7   strives to improve the quality of life of

8   New Yorkers by collaborating with local

9   organizations and investing in the talents

10   and assets of our communities to help them

11   develop, grow and thrive, empowering

12   individuals, strengthening families, and

13   investing in communities.

14   I'm going to go over some important

15   dates with you. This is our RFP timeline.

16   So the proposal due date is

17   March 15th, 2017, due at 2:00 p.m. in the

18   HHS Accelerator system. So again, your

19   proposals are due March 15th, 2017 at

20   2:00 p.m. in the HHS Accelerator system.

21   Please note, DYCD will not be accepting any

22   hard copies of proposals. In order to

23   respond to this RFP, you must be

24   pre-qualified in the HHS Accelerator

25   system. Again, please note the proposal

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 1                      Proceedings
 2      due date is March 15th, 2017 at 2:00 p.m.
 3      in HHS Accelerator.  Proposals submitted
 4      after this date will not be accepted.
 5      Notification of the award selections will
 6      be done through the HHS Accelerator system.
 7              The anticipated contract term will
 8      be July 1st, 2017 to June 30th, 2020 with
 9      options to renew for up to additional three
10      years.  If you still have questions after
11      this pre-proposal conference, you may
12      e-mail us at
13      dycd@rfpquestions@dycd.nyc.gov.  Please
14      note, in order to ensure timely responses,
15      all questions must be received no later
16      than March 6th, 2017.
17              All right.  So I want to go over
18      with you an important part of your -- of
19      the RFP which is the M/WBE utilization
20      plan.  So I saw some hands go up from
21      yesterday, we have some M/WBEs here, and I
22      just want to get a sense of who's here
23      because I'll be going over some things,
24      depending on where you fall.  So right here
25      we have the New York City M/WBE -- and by
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1   Proceedings

2   the way, who is our M/WBEs? If you could

3   just raise --

4   (Hands are raised.)

5   MR. BUNCH: Okay. So we got quite a

6   few. Okay. Great. All right.

7   So I'm going to go to a slide just

8   for you. So there's a Schedule B in the

9   RFP, Part II. This is referring to the

10   participation goal which counts towards the

11   RFP and is the M/WBE participation plan.

12   So for those that raised your hands, the

13   M/WBEs, you have the partial waiver. If

14   you decide to do a partial waiver, approval

15   must be obtained prior to proposal

16   submission. You have to submit Part III of

17   Schedule B to DYCD for approval no later

18   than March 8th, 2017 at the e-mail address

19   you see listed there. You also have to

20   submit Part II along about your approved

21   waiver form, Part III -- also known as Part

22   III, excuse me, must be submitted with your

23   proposal in the HHS Accelerator system.

24   If you're not going to do a partial

25   waiver, you have the full waiver option

1   Proceedings

2   which is approval must be obtained prior to

3   the proposal submission. You have to

4   submit Part II of Schedule B to DYCD for

5   approval no later than March 8th, 2017 to

6   the e-mail address listed there, with your

7   approved waiver form, also known as Part

8   III, must be submitted with your proposal

9   to the HHS Accelerator system.

10   So if you're an M/WBE, you have

11   three ways to meet the M/WBE utilization

12   plan. It could be, again, participation

13   towards the RFP goal, which is part of

14   Schedule B Part II, or you can do a partial

15   waiver, as I indicated, or you could do the

16   full waiver, but you have to do one of

17   those conditions there in order to meet the

18   M/WBE utilization goal.

19   For those that are for-profit but

20   not M/WBE, if you could just raise your

21   hands.

22   (Hands are raised.)

23   MR. BUNCH: So these are your

24   non-M/WBEs but you're a for-profit.

25   For-profit, but you're not M/WBE.

1	Proceedings
2	We got some fearful people. All
3	right.
4	So that's the second category,
5	for-profit non-M/WBE. So if you meet this
6	category, similar to the M/WBE plan but a
7	little different, you have three
8	conditions. One of the three conditions
9	you have to meet, again, the participation
10	goal which is your Schedule B Part II,
11	M/WBE participation plan, or you could do
12	the partial waiver which you fill out
13	Schedule B Part II, and you fill out Part
14	III, right, or you could do the full
15	waiver, Schedule B Part III, request for
16	waiver of M/WBE participation requirement.
17	All right. So those are our M/WBEs
18	and the for-profit non-M/WBEs.
19	Who's our non-profits?
20	(Hands are raised.)
21	MR. BUNCH: All right. Non-profits.
22	So for the non-profits, Schedule B
23	is not applicable to you. So all you have
24	do is upload your 501c3 at time of proposal
25	submission. All right. So again, based on

1   Proceedings

2   wherever you fall, these are the

3   requirements you'll have to meet.

4   All right. The computer has a mind

5   of its own.

6   Let's now turn this conference over

7   to our panel. I ask that you please hold

8   any questions until the end of the panel

9   presentation. I'd like to ask Natasha Mast

10   from HHS Accelerator. She'll be going over

11   the pre-qualifying proposal submission.

12   MS. MAST: Hi, everyone. I'm shy so

13   I'm hiding in the back today. Quick

14   question -- welcome. My name is Natasha

15   Mast. I work for the Mayor's Office of

16   Contract Services. HHS Accelerator, if

17   you've heard of us before, we just joined

18   the Mayor's Office of Contract Services in

19   the past year so just wanted to let you

20   know about that change.

21   Quick question, how many people here

22   have an Accelerator account?

23   (Hands are raised.)

24   MS. MAST: Awesome. How many people

25   are pre-qualified?

1	Proceedings
2	(Hands are raised.)
3	MS. MAST: And if you don't mind,
4	how many people are still working on their
5	pre-qualifications?
6	(Hands are raised.)
7	MS. MAST: That's okay. I'm going
8	to call Jenn. She's in the back. You may
9	already be speaking to her. We're
10	available at the end if you have any
11	questions about your actual application.
12	We do run, I just wanted to let you know,
13	we are running -- we do run webinars every
14	week on getting pre-qualified, we have
15	in-person trainings, and we have guides and
16	we have resources. My team also runs the
17	help desk so you can send us an e-mail
18	clarifying -- and ask us any clarifying
19	questions as you're trying to get
20	pre-qualified. So a lot of
21	times -- sometimes people look at our
22	pre-qualification and think we want it to
23	be more complicated than we want it to be,
24	so if something seems hard or off, just ask
25	the help desk and we'll clarify if you have

1   Proceedings

2   to do that before you spend a lot of time

3   on something.

4   For the folks that have gotten

5   pre-qualified, it was okay? Hopefully.

6   So I'm going to go through. You

7   need to have an account in Accelerator.

8   You need to be pre-qualified in Accelerator

9   to view the RFP, to review any addendums,

10   and to be able to propose to these

11   opportunities. So I'm saying that sort of

12   serious. This is a change. This is the

13   first time we're doing a professional

14   service RFP through our system, but we're

15   not new at this. This might be new to a

16   lot of you in the room. We have over $3.8

17   billion for health and human service RFPs

18   that are competed for in our system on an

19   annual basis.

20   So we have thousands of

21   organizations in the City that are

22   pre-qualified already. Your

23   pre-qualification lasts -- is good for

24   three years. Any time that an opportunity

25   comes up in the service areas that you're

1   Proceedings

2   pre-qualified in, you'll get e-mails. So

3   it's a really good spot for this

4   opportunity, and it's also a really good

5   spot to be in in general if you want to

6   continue to do business with the City.

7   All proposals are due at 2:00 p.m.

8   on the deadline -- on the due date

9   electronically. So make sure it says

10   submitted, that it's not in draft, and that

11   it's in submitted status. My team will

12   call you the day before as a reminder if

13   you're still in draft. So just make sure

14   it's in submitted. There's no way if you

15   don't click submit that these -- your

16   proposal will be reviewed. You have to

17   submit. That's the only way that DYCD is

18   able to view it.

19   If you submit it, you realize you've

20   made a mistake and you have to -- you've

21   uploaded a pizza menu, you are able to

22   retract this before the deadline. You can

23   take it back, put it back into edit mode,

24   make a quick correction and resubmit it,

25   but you have to resubmit it. If you

1   Proceedings

2   realize post 2:00 p.m. you want to do that,

3   it's not possible.

4   You'll notice I put our help desk

5   e-mail. We have an e-mail that we give

6   you. We try to be as responsive as

7   possible and reply within an hour during

8   business hours to any questions you may

9   have. If you have -- if you're

10   experiencing -- you have any kind of

11   questions, just let us know. You can

12   always ask for a call. We can pick up the

13   phone and call you back. We don't provide

14   a number but we'll call you.

15   And the one thing I'll note is we

16   can only answer questions about how to use

17   our system. We are not allowed to answer

18   any questions about the actual RFP. So if

19   you -- if it's -- if it's the day of and

20   you have a clarifying question that you

21   want to ask about this opportunity, my team

22   is not able to answer those because this is

23   DYCD's opportunity so they're the

24   ones -- the only ones allowed to speak to

25   what they're looking for, so I just wanted

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2   to clarify that.

3   Okay. So what is the

4   pre-qualification? In the past, if you

5   ever submitted a proposal to DYCD or any

6   City agency, you would have been asked for

7   a lot of your foundational documents in

8   hard copy, maybe three to five copies,

9   depending on the agency. What we've done

10   to make everybody's life easier, welcome to

11   this process, is we've made the

12   pre-qualification -- we've created a

13   pre-qualification system where we ask you

14   for those documents upfront, but we only

15   ask you every three years as opposed to

16   every time you propose. And with the

17   exception for the non-profits in the room,

18   we do need to see your filings on an annual

19   basis that you're up-to-date with the

20   Charities Bureau. But everybody else, you

21   just need to get pre-qualified, and you

22   just need to choose one service, Capacity

23   Building. So if you've been pre-qualified

24   with Accelerator for years but maybe not

25   for that service, go and apply for that

1   Proceedings

2   service. We just added it for this

3   opportunity.

4   The other thing I want to state is

5   if you're applying for the services, just

6   to give you a little hint, and we do not

7   need to see the full depth of your

8   experience for Capacity Building. I'm just

9   putting it out there. We just need to see

10   a form of proof, either a contract that

11   you've held or any funding in the past five

12   years where you've provided that service; a

13   staff member's resume, make sure the resume

14   says your organization; or a capability

15   statement if you don't have many

16   experience. Capability statements are very

17   rare, so don't go back to your office and

18   ask every single staff member for their

19   resume. We only need one form of proof.

20   Okay. So that's an example.

21   So once you're ready to propose,

22   you're going to go -- you're pre-qualified,

23   it's the due date, do it the day before so

24   you're not stressed. Why not? Let's do it

25   in advance. You'll go to the road map,

1   Proceedings

2   you'll find the opportunity for Capacity

3   Building, you'll click add new proposal.

4   You'll answer all the questions that they

5   have. They're very simple. You can start

6   your proposal today. You don't need

7   to -- you can work on it, upload documents

8   as you're ready, you can go back to it.

9   You don't need to do it all in one sitting.

10   You upload your required documents, and

11   only when you've uploaded everything that's

12   required are you able to submit.

13   Do not submit before you read

14   the -- before any addendums are released.

15   You'll want to read all the questions from

16   today, all the responses, but, you know,

17   the day before or so forth, submit your

18   proposal. And only level 2 users, which

19   probably everybody in here are able to

20   submit. So if you -- if you have an

21   administrative assistant that you gave

22   limited access to in Accelerator, you have

23   the rights to control that access. They

24   would not be able to submit this proposal

25   on behalf of your organization. So just

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2   make sure. If you are the only user in

3   Accelerator, you automatically have that

4   access but some of the large organizations

5   where there's hundreds of people using

6   Accelerator have created different

7   hierarchies for access. So I'm just

8   pointing out you have to be level 2.

9   You submit the proposal, and as I

10   mentioned, you can always retract it and

11   make any adjustments all the way up until

12   the 2:00 p.m. deadline. And we will call

13   you at Accelerator the day before if you're

14   in draft and say are you really proposing,

15   kind of get a sense if you're proposing.

16   We're tracking, we're sharing with DYCD if

17   you're proposing.

18   How many people in this room have

19   proposed before?

20   (Hands are raised.)

21   MS. MAST: I'm just curious. Okay.

22   That's great. Okay. So this is not new to

23   most of you. That's great.

24   And for the folks if this is new or

25   you're not pre-qualified, my team's job is

1   Proceedings

2   to get you through this process and to help

3   you, so Jenn and I are here until the end

4   and you can ask us any questions or

5   follow-up with our help desk, and it's

6   probably one of us answering your questions

7   on the other side. Thank you.

8   MS. JONES: So good afternoon,

9   everyone, and welcome. I'm really glad to

10   see so many of the individuals who

11   participated in yesterday's networking

12   session. I'm glad you took me up on my

13   offer and came down, and I hope you'll have

14   an opportunity to mingle with others at the

15   end to see who's in the room.

16   So, good afternoon. I am Meryl

17   Jones, Assistant Commissioner for Capacity

18   Building and Professional Development, and

19   on behalf of DYCD, I welcome you to this

20   Pre-Proposal Conference for Capacity

21   Building Services, Strengthening

22   Organizations.

23   So how do we define Capacity

24   Building? We defined it as any activity,

25   such as strategic planning, board

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2   development, or improvements in program

3   practices or technology, that increases an

4   organization's program outcomes or

5   sustainability. Through its Capacity

6   Building Division, DYCD fosters continuous

7   improvement and programmatic learning at

8   professional development among its funded

9   non-profits to help them become more

10   effective service providers.

11   This particular RFP responds to the

12   unique organizational needs facing

13   DYCD-funded service providers as they

14   navigate complex funding, programmatic and

15   operational structures in a frequently

16   changing labor and demographic landscape.

17   So this is the mission, Capacity

18   Building, and I think what's most important

19   to point out is of course our mission is to

20   strengthen the capacity of our

21   organizations that we -- that are funded by

22   us, but most importantly we want to make

23   sure that these agencies are ready, willing

24   and able to benefit from our services.

25   Additionally, the goals of our

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2   particular unit are also to increase

3   non-profit ability to achieve positive

4   outcomes for their participants, and to

5   really support the organizations funded by

6   us through continuous quality improvement.

7   Over the past decade, DYCD has invested in

8   capacity of non-profits as a strategy for

9   ensuring that youth and families receive

10   high-quality effective services.

11   So these are the different types of

12   capacity building that we support. These

13   are the various modalities which include

14   coaching, consulting, training,

15   conferences, publication. We've also

16   developed partnerships and some really

17   amazing university partners. So we have

18   FDC training, we oversee the cultivating

19   curiosity initiative, we've created a

20   number of college-based partnerships which

21   have supported staff at our funded agencies

22   in terms of achieving their degrees, and we

23   also work -- provide training to

24   various -- our colleagues here at DYCD and

25   our various program areas.

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 1                    Proceedings
 2          The Capacity Building Unit is
 3      responsible for professional development,
 4      and organizational development and
 5      technical assistance, so our team currently
 6      oversees a portfolio of approximately -- of
 7      14 technical assistance providers
 8      supporting 24 content areas and our budget
 9      is approximately $6 million annually.  We
10      also lead many special projects and pilots
11      in collaboration with our colleagues here
12      in the agency that are customized to the
13      needs of that particular portfolio, and we
14      are also mindful of and facilitate a number
15      of strategic partnerships that -- with
16      resource-rich organizations that can help
17      enhance programs.  We've developed Citywide
18      advanced that engage CBOs with real
19      innovate programming and model exemplary
20      practices.
21          To support our Capacity Unit
22      strategies, we leverage the expertise of
23      technical assistance partners to offer
24      community-based organizations -- so we
25      leverage the expertise of our technical
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1   Proceedings

2   assistance providers to offer

3   community-based organizations support from

4   leaders in the field. Hundreds of

5   organizations have benefited from a range

6   of services such as intensive

7   organizational development consulting,

8   focusing on organizational development,

9   board development, financial management,

10   financial planning, program design and

11   implementation, as well as performance

12   management. We've provided training on key

13   topics in youth and family services and

14   resources for staff on a range of topics

15   that support their program requirements.

16   On average, we training for -- we provide

17   training for over 5,000 individuals a year.

18   There are usually wait lists for our

19   trainings, and our technical assistance

20   providers facilitate anywhere from 15 to 20

21   professional development activities per

22   month.

23   Our current approach to capacity

24   building includes incorporating adult

25   learning principles, an increased focus on

1   Proceedings

2   multiple-level staff support. It is vital

3   that capacity building reflects an

4   understanding of the key role played by

5   staff at all organizational levels. We

6   partner with content specialists and field

7   experts. We promote quality by focusing on

8   more intensive pure-based learning

9   opportunities, and we integrate -- the

10   integration of coaching as well in terms of

11   our followup services. This is really key

12   because all the services that include

13   coaching emphasize the connection between

14   capacity building activity and program

15   practice. And we encourage strategic

16   partnerships among our providers,

17   especially in service and funded agencies

18   that may want to leverage their limited

19   resources.

20   Outcomes are also important to us,

21   and as such, we have implemented CV

22   Advance, and that's our online management

23   tool which enables analysis of critical

24   data to assess trends in our capacity

25   building services among our funded TA

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2   providers. And by putting together

3   practitioners, researchers and other

4   experts to strengthen organizations and

5   programs, DYCD strengthens organizations by

6   investing in their planning, leadership

7   development and infrastructure. We enhance

8   program quality by building frontline and

9   supervisory staff knowledge and skills, and

10   we promote learning and continuous

11   improvement.

12   The investment in capacity building

13   has helped us amend DYCD standing, and as a

14   field leading government agency, that

15   creates exemplary program models and

16   resources, strengthens our organizations,

17   and strives to continuously improve

18   services for youth and families. By

19   building on these past successes, the

20   Capacity Building Division will continue to

21   provide programmatic technical assistance

22   services that focuses on issues of national

23   multi importance, strengthen services for

24   our participants, and increase positive

25   outcomes.

1   Proceedings

2   So DYCD's Capacity Building Unit

3   will continue to bolster community-based

4   organizations in the field by offering

5   organizational development technical

6   assistance services, creating leadership

7   development opportunities, preparing staff

8   to be effective managers and supervisors,

9   encouraging workers to pursue their

10   certifications and college degrees. We

11   promote peer and action learning networks,

12   and develop partnerships and other

13   resources that support program equality.

14   Now I'm going to turn it over to

15   Miguel. He's going to take you through the

16   RFP service options.

17   MR. BONILLA: Thank you, Meryl.

18   Hello. Good afternoon. Do you guys

19   have your coffee? You're ready for this?

20   My name is Miguel Bonilla. I'm

21   going to take you through the four service

22   options. So there's four separate

23   competitions, just to be clear. It's one

24   RFP but you would have to apply separately

25   for each one. So I'm going to take you

1   Proceedings

2   through all the four service options.

3   So the first one is Board

4   Governance, the next one is Fiscal

5   Management, Fund Development and

6   Organization Development. Then I'm going

7   to also tell you what the amounts are for

8   each service option.

9   So under Board Governance, what

10   we're looking for is, if you work in the

11   field of board governance, you know that

12   it's critical to have strong board

13   governance in order to help an organization

14   pursue its mission and services. We know

15   that engaged boards are more likely to

16   evaluate organizational performance,

17   oversee finances and raise money. We're

18   looking for a consultant who has the

19   expertise and knowledge to help board

20   leadership understand its fiduciary

21   responsibility, expectations for the board,

22   and evaluate the executive director. So

23   that's what we're looking for in that

24   service option.

25   For Fiscal Management, we know that

1   Proceedings

2   strong fiscal management is needed to hire

3   staff appropriately, manage organizational

4   growth, and deliver high-quality services.

5   We're looking for a contractor that would

6   help non-profit leaders create

7   program-based budgeting, monitor and

8   understand finance functions, develop and

9   maintain appropriate fiscal controls, and

10   help boards understand their fiscal

11   position, among other things.

12   Under Fund Development, we realize

13   that it's important to have a plan to

14   create cash reserves. A non-profit should

15   have diversified funding streams and have

16   the skilled staff to be able to raise money

17   for your organization. A contractor would

18   help non-profit leaders plan for diverse

19   funding base, identify and recruit

20   appropriate development staff and engage

21   board in fundraising.

22   Under Organizational Development, we

23   know that it's critical for organizations

24   to have skills and practices that bring

25   together stakeholders to plan and execute

1   Proceedings

2   their work, promote healthy human resource

3   practices, and manage conflict well.

4   Contractor would help non-profit leaders

5   with strategic planning, establishing

6   internal monitoring systems, effective

7   management and supervision practices.

8   These are the service options and

9   amount per year and the total for three

10   years. As Keith mentioned, this is what we

11   would have for the next three years with an

12   option to renew after the -- for an

13   additional three years after that.

14   These are some resources

15   that -- some resources to -- if you want to

16   find out more about us. On our website,

17   there's an area where we've listed a lot of

18   documents that tell you more about

19   the -- our unit, the Capacity Building

20   Unit, and there's also a link to a social

21   media policy.

22   MR. BUNCH: Thank you to Miguel and

23   Meryl for going over some information

24   regarding Capacity Building, RFP content

25   areas.

1	Proceedings
2	I'd like to go over post-award
3	requirements. So we have general
4	information and regulatory requirements.
5	So I just want to go into responsibility
6	determinations, very important. Please be
7	advised that it's a requirement for all
8	contractors to be determined responsible in
9	the post-award phase, therefore, please
10	make sure your vendex filings are
11	up-to-date, your charities filings are
12	current, and ensure that any outstanding
13	liens or adverse information has been
14	resolved. Unresolved issues often cause
15	significant delays in the post-award
16	process. Also to mention the Notice for
17	Proposer Subcontractor Compliance, and the
18	HireNYC Rider.
19	I also want to go over the insurance
20	requirement. So the contractor must
21	demonstrate that necessary insurance
22	coverage -- the contractor must demonstrate
23	that necessary insurance coverage,
24	commercial general liability insurance of
25	$1 million per occurrence, and $2 million

1   Proceedings

2   aggregate; motor vehicle liability

3   insurance of $5 million, if applicable; and

4   workers' compensation insurance is in place

5   from the first day of the contract by

6   providing an original certificate of

7   insurance naming the City of New York,

8   together with its officials and employees,

9   as an additional insured. DYCD will not be

10   able to proceed with any processing of an

11   awarded contract until it has obtained

12   proof of the necessary insurance coverage.

13   All right. So I think this is your

14   favorite session of the day. So we have

15   the Q&A. At this time, we'll have the

16   session. Please note the session is only

17   for purposes regarding the RFP. Moreover,

18   this is your only opportunity to ask the

19   panel questions. Once the Q&A session

20   ends, the panel will not be able to take

21   any questions, therefore, if you want to

22   ask the panel any questions, this is your

23   opportunity to do so.

24   Once again, please make sure all

25   questions pertain to this RFP. Anyone who

1   Proceedings

2   wishes to ask a question or needs further

3   clarification, you're going to line up next

4   to me to my left in front of this

5   microphone. Please be sure to state your

6   name and the name of your agency, and

7   reference the page of the RFP that pertains

8   to your question.

9   Anyone have questions regarding the

10   RFP?

11   MS. LEVINE: I'm from Cause

12   Effective, Judy Levine. Question about

13   staffing, RFP -- question 16 in the RFP.

14   You want the roles, qualifications,

15   responsibilities and job expectations for

16   staff positions. Do you want frontline,

17   consulting staff and administrative, and

18   program board initiative staff or just the

19   frontline service provider staff? It's

20   page 4. It's part of Attachment B.

21   MS. JONES: So for us, it is related

22   to the staff that would be responsible for

23   the administration of the particular

24   contract.

25   MS. LEVINE: So administration as

1   Proceedings

2   well as the -- okay.

3   I have a couple of other questions

4   but if other people want to go ahead of me

5   they could.

6   Okay. The one right before that, it

7   says assume a single DYCD-funded

8   organization, I guess it's service option

9   4-B. I'm assuming when you said 2,400

10   characters, it's not 30 words but it's 300

11   words?

12   MR. BONILLA: That's correct.

13   MS. LEVINE: Okay. Just making sure

14   you don't want seven questions in 30 words.

15   Moving to the next page, Evaluation

16   of Capacity Building. When you're

17   referring to question 21, if your capacity

18   building service are subject to an external

19   assessment, is that only a DYCD assessment

20   or if we have done -- had an external

21   evaluator evaluate our programs, can we

22   submit that?

23   MS. JONES: Yes. You just may not

24   have had any DYCD contracts so...

25   MS. LEVINE: Right. We haven't.

1   Proceedings

2   Okay.

3   And last thing, you talk about

4   control of the training facility and what

5   you mean by that, and a training facility

6   of 50 or a training facility in which we do

7   consulting in groups of 20? What do you

8   mean by that?

9   MR. BONILLA: Control of your

10   facility so --

11   MS. JONES: I'm sorry. Could you

12   repeat the question? You said control in

13   terms of -- space in terms of 20 or 50?

14   MS. LEVINE: Yeah. I mean, we have

15   coaching space in space for 20 training at

16   our site. If you want us to do a seminar

17   for 100, we're going to have to look

18   outside, and if so, should we indicate how

19   we would do so if you would want so?

20   MR. BONILLA: It's what you would

21   plan to do so -- but you should have a

22   lease. So I don't think the number matters

23   as much as you having control over it and

24   being able to demonstrate proof that you

25   have control over your space. So whether

1   Proceedings

2   it's a lease, whether it's some kind of

3   written agreement, you have to be able to

4   demonstrate that you have control over your

5   facility. So the number at this point

6   doesn't matter because we wouldn't -- you

7   know, if you got the contract, we would

8   negotiate that later.

9   MS. LEVINE: Okay. Those are my

10   questions.

11   MR. SHAH: Sanjay Shah, Paragon

12   Management Group. My question is sort of

13   general about RFP. I understand you're

14   going to select four vendors out of this.

15   And the question I have is four vendors, is

16   it going to be one vendor in each area, or

17   how is it?

18   MS. JONES: We anticipate one vendor

19   per competition, one vendor per competition

20   area.

21   MR. SHAH: So one for fiscal and one

22   for each service?

23   MS. JONES: Yes.

24   MR. SHAH: Okay. Thank you.

25   MS. KINCH: Good afternoon. I'm

1   Proceedings

2   Cheryl Kinch from Kinch Law Group. I have

3   a question regarding mechanism. Do you

4   have a mechanism whereby I can access a

5   list of other perspective responders that

6   may be interested in teaming?

7   MS. JONES: Natasha, is that

8   available through Accelerator?

9   MS. MAST: I'm coming. Sorry.

10   Not -- I'm looking to see if Dana is

11   here. So how to match make between -- we

12   do have a -- if you are pre-qualified, and

13   even if you're not, if you have an account

14   in Accelerator, you can go to the third tab

15   for this opportunity and you can see who's

16   pre-qualified in the whole City for this

17   opportunity. So you can see everybody

18   who's pre-qualified for Capacity Building,

19   which is actually a reasonable number and

20   we provide the phone numbers for every one

21   of those organizations.

22   But do you know, if they're

23   interested, is it on the sign-in sheet

24   or --

25   MS. CANTELMI: So, Dana Cantelmi

1   Proceedings

2   from DYCD. We will also be posting the

3   attendance roster on our website along with

4   the transcript, so you will get that

5   information. It probably will not be up

6   until probably a week from now, but it will

7   be on our website.

8   MS. MAST: Do we want to -- would

9   you want to -- is there anybody interested

10   here? Like could we just have hands or do

11   we not want to do that?

12   MS. JONES: Well, I had asked Keith

13   and he said at the end when we've

14   officially closed the pre-proposal

15   conference, we would encourage each person

16   who wants to stand up, introduce themselves

17   and the contact area that they are

18   interested in so that folks can know who's

19   in the room at the moment and maybe some

20   matchmaking can happen after, but it has to

21   happen after we officially close the Q&A.

22   MR. SHAH: But you are going to

23   share the list of attendees today, right?

24   Because that would be very helpful.

25   MS. JONES: Yes. It says it right

1   Proceedings

2   there.

3   MS. MAST: Yeah, it's going to be

4   shared, but we also need to remember,

5   Capacity Building was just added to HHS

6   Accelerator in the past month, so I would

7   say the majority of folks that are

8   pre-qualified for that service are all

9   sitting here. So I think that that would

10   definitely be a great resource that you can

11   go to immediately after today, go into the

12   system and we provide the contact

13   information for those organizations so you

14   all have access to each other's because I

15   don't think you would have gotten yourself

16   pre-qualified if you weren't interested in

17   this.

18   UNIDENTIFIED SPEAKER: Excuse me.

19   What if you're not pre-qualified?

20   MS. MAST: Not everybody's

21   pre-qualified, I get that, but it's just a

22   starting point for the folks that have

23   gotten pre-qualified. And I should

24   mention, about a fourth of the room

25   mentioned that they're not pre-qualified

1   Proceedings

2   yet. Let's say you get pre-qualified in

3   two days, your name's on that list in two

4   days. So that's a living, breathing list

5   in Accelerator for who's pre-qualified for

6   Capacity Building.

7   MS. JONES: And in addition, as you

8   see, the attendance rosters will be on the

9   website for viewing. So Dana says that

10   goes up in a week, you compare the

11   attendance roster versus who's

12   pre-qualified so you'll know who is in the

13   room today.

14   MS. PUGLISI: So I actually have a

15   followup question on what you --

16   MR. BUNCH: If you could just come

17   up to the mic so we can get that on record.

18   MS. PUGLISI: Sure. So the --

19   MR. BUNCH: Name and organization.

20   MS. PUGLISI: Oh, I'm sorry. Maria

21   Puglisi, Right Tree Consulting, and I'm a

22   WBE and I am pre-qualified, which is great,

23   in Accelerator. So my question is, is when

24   you go to Accelerator and look at firms, I

25   don't recall if you could tell if someone

1   Proceedings

2   is an M/WBE or not.

3   MS. MAST: I don't think you can

4   tell if they're an M/WBE but you can tell

5   if they are for-profit or not-for-profit,

6   but you cannot tell if they're an M/WBE as

7   of -- in Accelerator. But we do share

8   their corporate status, which is an

9   indicator.

10   MR. BUNCH: Any other questions?

11   MS. ZHU: Good afternoon. Thank you

12   for your presentations. So my question is

13   about the four vendors that you're going to

14   select. Are those vendors -- will those

15   vendors who have previous experience of

16   working with other vendors get higher

17   scores on their RFPs? Like do you look for

18   their previous history, you know, their

19   relationship of working with each before

20   before you select those four vendors?

21   MS. BONILLA: While Bob is looking

22   for that, we should mention there's a state

23   directory of certified M/WBE vendors. If

24   you're looking for vendors, that's another

25   place to look. I don't know if the City

1   Proceedings

2   has a directory as well but there is a

3   State. If you Google New York State M/WBE

4   directory, you'll find the site.

5   MS. CANTELMI: So it is an open

6   competition. The structured proposal form

7   does ask specific questions on your

8   experience, so obviously the way that you

9   demonstrate your experience on the

10   structured proposal form will ultimately

11   determine how many points an evaluator will

12   give you. So it really is up to the way

13   you're writing our proposal, so that way

14   the evaluator who's actually reading it can

15   understand and know what capabilities your

16   organization has to run any of those

17   competitions that you're applying for, but

18   it is an open competition so anyone can

19   apply and they will get the points that the

20   evaluators feel appropriate as however they

21   actually filled out the structured proposal

22   form.

23   MS. ZHU: Yeah. I was just curious

24   like just in case there's some ties and

25   will you select the four vendors who have

1   Proceedings

2   worked before than those who haven't had

3   experience?

4   MS. CANTELMI: So there's a basis

5   for award in the actual RFP. We do

6   typically go with whoever is the highest

7   score, however, if there is a tie, there

8   will be additional steps that would have to

9   be taken, but this at point in time we

10   don't know who's competing or what the

11   scores and things like that will be, but

12   there is a basis of award that does outline

13   the steps that would be taken for this

14   selection.

15   MS. ZHU: Thank you.

16   MS. GOODRIDGE: Thank you. Sandra

17   Goodridge, Social Strategies Group. Thank

18   you for your presentations. I have a

19   question. My company is an M/WBE. Can an

20   M/WBE bid twice, and this is what I mean by

21   that, can an M/WBE bid in a category and

22   then also team with another business to

23   help them or non-profit to help them meet

24   their M/WBE goals? Is that permissible?

25   MS. BONILLA: Yes, that's -- you can

1   Proceedings

2   submit several proposals. That's correct,

3   right, Dana?

4   MS. CANTELMI: Yeah. So you can

5   submit a proposal, if you feel that you're

6   able to do the work yourself, you can

7   definitely submit a proposal. We are not

8   prohibiting anyone from building

9   subcontractor relationships and helping

10   other organizations out, so that's totally

11   up to you. There's no limit.

12   MS. GOODRIDGE: Okay. Thank you.

13   MS. SEN: Hello. I'm Suhrita Sen

14   from Infrastructure Advisors. My question

15   is for the three options you explained for

16   the M/WBEs, can you explain in what

17   circumstances should we choose a partial

18   waiver versus a full waiver versus going

19   for the full? I wasn't clear on that.

20   MR. BUNCH: Right. So let's say --

21   MS. CANTELMI: So for the M/WBE

22   waiver, just to clarify a point, if you are

23   a certified M/WBE, your participation in

24   the program will count towards that goal,

25   so you're going to be filling out Part II

1   Proceedings

2   and showing that your participation in that

3   program will meet that goal. If you are a

4   for-profit that is not a certified M/WBE,

5   then you would be filling out Part II and

6   it's really up to you because if you are

7   saying that you're going to meet 15 percent

8   of that goal, and what that means is that

9   you're going to be subcontracting out 15

10   percent of the work with a certified M/WBE,

11   then it's really up to you. You would have

12   to figure out whether it's a full waiver or

13   a partial waiver. So say, for example, you

14   know that you have the capability to do the

15   work completely yourself, you're not going

16   to subcontract any of the work, you will

17   then be seeking a full waiver because you

18   will not be able to meet that 15 percent

19   participation goal.

20   So again, if you're able to do the

21   work yourself and you're not going to seek

22   any subcontracting if you are awarded the

23   contract during the term of the contract,

24   you will be seeking a full waiver if you

25   are a for-profit organization. If you are

1   Proceedings

2   a for-profit who says I want to meet 5

3   percent of the goal, then you would be

4   seeking a partial waiver. And again, all

5   waivers have to be submitted to DYCD and

6   approved before the due date of the RFP and

7   it has to be submitted with the proposal in

8   Accelerator.

9   If you are a non-profit, then you're

10   exempt from the M/WBE participation but you

11   would have to upload your 501c3 so that we

12   will know when we're doing our responses to

13   check that the Schedule B did not apply.

14   So it's really up to organizations

15   to figure out whether or not they can do

16   this work completely themselves. And

17   again, this is for the for-profits that

18   aren't certified under M/WBEs, can you do

19   the work completely yourself and you're not

20   seeking any subcontracting. But again, we

21   do have and encourage a 15 percent

22   participation goal for this RFP.

23   UNIDENTIFIED SPEAKER: So just to

24   summarize then, for M/WBEs, they

25   automatically meet the goal so there is no

1   Proceedings

2   three options, there's only one option.

3   MS. CANTELMI: Right. So for

4   M/WBEs, you're meeting that participation

5   goal. You're not going to be seeking a

6   waiver because you will be filling out that

7   Part II and you're still required to upload

8   a Part II with your proposal submission but

9   you're not seeking an actual waiver.

10   If you can just come up because

11   we're transcribing this pre-proposal

12   conference and we just want to make sure

13   that we're getting everyone's name and

14   organizations on the transcript.

15   UNIDENTIFIED SPEAKER: I have a

16   question to followup. You said you

17   encourage M/WBE participation. By

18   definition, if you're seeking a waiver,

19   you're basically saying that you

20   cannot -- you're not using or cannot --

21   MS. CANTELMI: We're leaving it up

22   to the organizations. Again, we're looking

23   for someone that can provide the services,

24   that have the capacity to provide the

25   services. We just want to make sure that

1   Proceedings

2   we're getting someone that can meet the

3   goals.

4   UNIDENTIFIED SPEAKER: Understood,

5   but from a compliance perspective, how much

6   effort is made to not only encourage, but

7   to say to responsive organizations here,

8   you're looking for a waiver, but here is a

9   list of M/WBEs?

10   MS. CANTELMI: So I don't know how

11   many folks are looking for waivers and I

12   don't know how many folks that are

13   certified M/WBEs that are going to be

14   applying for this a hundred percent, so

15   it's really hard for me to --

16   UNIDENTIFIED SPEAKER: Understood,

17   but my question is going forward, if you

18   do, let's say half of the applicants come

19   to you and say we're seeking waivers, I'm

20   trying to understand how much effort is put

21   into saying to them --

22   MS. CANTELMI: So organizations

23   that --

24   UNIDENTIFIED SPEAKER: -- here's a

25   list, you don't need a waiver because

1   Proceedings

2   here's as list of qualified M/WBEs that can

3   provide this service.

4   MS. CANTELMI: So again, it goes

5   back to whether or not the provider that's

6   proposing can provide the service. So they

7   would actually have to fill out all of Part

8   III and give references. Like it's not

9   just filling out a form. Like they have to

10   go through a review process, we're checking

11   references, we're following up with MOCS,

12   so it is a process that has to take place.

13   So again, I mean, if an M/WBE wants

14   to apply to the RFP, then definitely -- you

15   know, and again, I don't know who's going

16   to be submitting waivers and if they do

17   submit a waiver, we will be following

18   the --

19   UNIDENTIFIED SPEAKER: I'm going to

20   try one more time.

21   MS. CANTELMI: So maybe Bob will --

22   MR. FRENZEL-BERRA: What I'm hearing

23   is all proposers can have the option to

24   provide all the services themselves or to

25   subcontract out part of their services and

1   Proceedings

2   indicate that in the proposal. So if an

3   organization plans to do all the work

4   itself then -- and not subcontract, then

5   they can apply for a waiver on that basis.

6   If they subcontract, then they're, for

7   certain applicants, for-profits, they then

8   have to consider the 15 percent.

9   UNIDENTIFIED SPEAKER: Okay. My

10   comment -- I have a further comment. As an

11   attorney who has extensive compliance

12   background, my comment is how much effort

13   is going to be made to adhere to the

14   compliance for M/WBE goals because if there

15   isn't sufficient effort in seeing that

16   there is adherence to those goals, then any

17   applicant can say oh, we're applying for a

18   waiver, then the M/WBE goal is meaningless.

19   So that's my point.

20   UNIDENTIFIED SPEAKER: I think if I

21   were to add a phrase is, is there an

22   evaluation criteria for compliance with the

23   M/WBE goal? That is the bottom line. How

24   many points are awarded?

25   MS. CANTELMI: So there is no points

1   Proceedings

2   awarded specifically to --

3   UNIDENTIFIED SPEAKER: So then that

4   means there is no -- that this is just

5   not --

6   MS. CANTELMI: So again, if there's

7   comments or anyone that wants to come up,

8   you do have to come up because they are

9   transcribing.

10   MS. BINUA: Good afternoon,

11   everyone. I'm sorry for my voice. I am

12   from Padilla & Company. I just want to

13   share with you. We have been doing audits

14   for Local Law 1, okay, for it to require

15   all government contracts to have the

16   participation goal of the M/WBE. So I

17   think what you need to have a waiver if you

18   are already an M/WBE, then that's the time

19   that you can request for a waiver because

20   you can do the job, but if you are not an

21   M/WBE, you have to satisfy the

22   participation goal. Okay. That is based

23   on our audit of the Local Law 1.

24   MS. CANTELMI: So again, so the

25   instructions for the M/WBE requirement and

1   Proceedings

2   the goal is in the RFP. It's outlined.

3   You know, we can take additional questions

4   after, but this is -- there is a 15 percent

5   goal on the RFP. We encourage and would

6   love to have M/WBEs in our program and if

7   M/WBEs can do the full program without

8   subcontracting a hundred percent, that's

9   great. We're not saying that folks should

10   apply for a waiver. We're holding -- we're

11   allowing folks to network at the end of

12   this to see if it could, you know, work,

13   but again, if they are applying for a

14   waiver, we will follow the steps as

15   outlined in the RFP.

16   If you could come up and state your

17   name.

18   MR. SHAH: Sanjay Shah, Paragon

19   Management Group. I think what others have

20   been saying and I will try to rephrase it

21   in a different way, there has to be points

22   assigned to the meeting of the M/WBE goal.

23   We do work with the federal agencies and

24   when they do set asides, there are projects

25   sometimes, they are going to both small

1   Proceedings

2   firms and large firms but they set aside

3   like ten points for those who are, you

4   know. So unless you assign points that are

5   in the determination, I think all these

6   goals, and I understand what you're talking

7   about, has no practical, you know, impact,

8   number one.

9   Number two, I'm actually in the

10   process of pre-qualification and we should

11   be submitting in a day or two, but I

12   already saw a number of firms so --

13   MS. MAST: What?

14   MR. SHAH: A number of firms that

15   are non-profits that are pre-qualified in

16   this thing. If any of them are M/WBE, I

17   think the onerous should be on those

18   seeking waiver, why they have not used

19   pre-qualified firms, meaning that there

20   should be a higher bar for them --

21   MS. CANTELMI: Non-profits can't be

22   certified M/WBEs though.

23   MR. SHAH: No, not non-profit. I'm

24   talking about for-profit.

25   So if they are seeking waiver, then

1   Proceedings

2   there should be a higher bar for them to

3   explain why they want a waiver when they

4   are pre-qualified M/WBE.

5   MS. CANTELMI: So point definitely

6   taken, but for this RFP, as I mentioned, we

7   did not put any point preference, but

8   definitely your point taken.

9   MR. SHAH: But it is not too late to

10   do that, that's what we are saying. It's

11   not too late to do that. All this talk

12   about promoting and M/WBE firms, ultimately

13   it comes down to whether or not it is, you

14   know, in the points, it is in the scoring,

15   otherwise it's talk. I'm sorry. I am

16   saying it bluntly but that's what it is.

17   UNIDENTIFIED SPEAKER: And I'm just

18   going to add, I was in the City

19   Comptroller's meeting for M/WBEs and -- I'm

20   sorry. New York City, the last time was

21   audited had a four percent number for M/WBE

22   compliance and it has gone down to two

23   percent, so just to share that when you

24   take out RFPs, just to keep that in mind.

25   It's quite pathetic to start with.

1   Proceedings

2   MR. BUNCH: All right. If you have

3   a question, please feel free to come to the

4   microphone. Only if you have a question,

5   please.

6   Can you hear me? So I'll speak

7   louder.

8   So if you have a question regarding

9   the RFP, you're free to come up.

10   MS. RICH: Hi. Susan Rich with

11   LIFMS. We're a WBE certified New York City

12   and New York State CPA practice. We

13   currently consult with several DYCD CBOs.

14   My first question is, is that a good thing

15   or a bad thing?

16   MS. JONES: If they're happy with

17   your work, I'm assuming it is.

18   MS. RICH: Is it a conflict of

19   interest if we're consulting with some DYCD

20   CBOs?

21   MS. JONES: No.

22   MS. RICH: Okay. And just -- my

23   question is, if you're truly committed to

24   the clients of these CBOs, the DYCDs, which

25   are minorities and underserved populations,

1   Proceedings

2   why in the world doesn't DYCD put its money

3   where its mouth is and implement a no

4   waiver policy on M/WBE just like New York

5   State OCFS has done, like many other

6   agencies? You're progressive and you're

7   making so much progress. I would really

8   take this back to your leadership and tell

9   them the feedback you got here from

10   everybody, that we think it's somewhat

11   hypocritical not to provide services to

12   minorities, and then when they own firms

13   like many of these people here and they're

14   trying to build business, that you're not

15   supporting them.

16   MS. CANTELMI: Again, so I hear

17   everyone and note definitely taken. The

18   Schedule B and the waiver forms are not

19   developed by DYCD. This is an ongoing

20   effort for this administration and we will

21   bring that back, but for purposes of this

22   RFP, this is what has been set but

23   definitely we will take it back. We hear

24   you all.

25   MS. RICH: The RFP can be changed

1   Proceedings

2   during the Q&A process.

3   MS. CANTELMI: If we change anything

4   in the RFP, an addendum will be released

5   but as of right now, that's what is stated.

6   MS. ZHU: Hi. Cheng Zhu with Humor

7   Leadership Consulting, specializing in

8   providing leadership and organizational

9   development and training services. So can

10   a vendor be a prime and a sub for proposals

11   at the same time, like a prime for one area

12   and then sub for another?

13   MS. JONES: Yes. Someone else asked

14   that question.

15   MS. ZHU: Oh, okay. Great. Thank

16   you.

17   MS. DAVIDOWITZ: Hello. Merna

18   Davidowitz, JCCGCI. I have a question.

19   There are four competitions and you're

20   choosing four awards. Are you committed

21   that each competition will have a different

22   awardee, or as I noticed in other

23   competitions, sometimes the same

24   organization is getting two or three?

25   MS. CANTELMI: So again, we don't

1   Proceedings

2   know who is applying. We do have a base

3   for award, the right to see if there is any

4   concerns about demonstrating capacity, but

5   we are not at this time stating whether or

6   not one vendor will be awarded multiple

7   competitions or one competition each. It

8   all depends on who's applying and whose

9   scores that are being received.

10   Anyone else?

11   (No response.)

12   MR. BUNCH: Once, twice, three

13   times.

14   (No response.)

15   MR. BUNCH: All right. If there's

16   no questions, please be on the lookout for

17   any addendums that may be released in HHS

18   Accelerator. Also, please remember the due

19   date for proposal submission is

20   October 6th, 2017 -- excuse me. Please

21   note the proposal due date is

22   March 15th, 2017. Again, the proposal due

23   date is March 15th, 2017 at 2:00 p.m. in

24   the HHS Accelerator system. And again,

25   please be on the lookout for any addendums.

1   Proceedings

2   I want to thank everyone for

3   attending, and this concludes our

4   pre-proposal conference.

5   (Time noted: 3:10 p.m.)

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1

2   C E R T I F I C A T E

3

4   STATE OF NEW YORK   )
) ss.:
5   COUNTY OF RICHMOND) ss:

6

7   I, JENNIFER CASSELLA, a Notary Public

8   within and for the State of New York, do hereby

9   certify:

10   I reported the proceedings in the

11   within-entitled matter, and that the within

12   transcript is a true record of such proceedings

13   to the best of my ability.

14   I further certify that I am not related

15   to any of the parties to this action by blood

16   or marriage; and that I am in no way interested

17   in the outcome of this matter.

18   IN WITNESS WHEREOF, I have hereunto set

19   my hand this 19th day of February, 2017.

20

21   _____

22   JENNIFER CASSELLA

23

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                In the Matter of

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DEPARTMENT OF YOUTH & COMMUNITY DEVELOPMENT

4

5   CAPACITY BUILDING SERVICES:
           STRENGTHENING ORGANIZATIONS
6   PRE-PROPOSAL CONFERENCE
   ---X

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8   2 Lafayette Street, 14th Floor
           New York, New York 10007

9

10

           February 15, 2017
11   2:11 p.m.

12

13

           Transcript of Proceedings

14

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16

17 Reported By:

18   Jennifer Cassella

19

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21

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2   A P P E A R A N C E S

3   KEITH BUNCH, Assistant Deputy Agency Chief
       Contracting Officer

4
       NATASHA MAST, HHS Accelerator

5
       MERYL JONES, Assistant Commissioner

6
       MIGUEL BONILLA, Director of Organization Development

7
       ROBERT FRENZEL-BERRA, Director of Research and

8   Program Development

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1   Proceedings

2   MR. BUNCH: Good afternoon,

3   everyone. Good afternoon. Thank you for

4   your patience. I see some familiar faces

5   from yesterday.

6   Raise your hands if you went to the

7   M/WBE event yesterday.

8   (Hands are raised.)

9   MR. BUNCH: Okay great. Glad you're

10   here today. Thank you.

11   On behalf of Commissioner Chong, we

12   would like to welcome you to the Department

13   of Youth and Community Development's

14   Pre-Proposal Conference for Capacity

15   Building Services. My name is Keith Bunch,

16   Assistant Deputy Agency Chief Contracting

17   Officer.

18   So here's our agenda for today.

19   We'll have a panel introduction, RFP

20   timeline requirements. We'll be going over

21   some pre-qualifying and proposal submission

22   information from HHS Accelerator. We'll go

23   into detail about capacity building. We'll

24   go forward with RFP content areas. At the

25   end, we'll discuss post-award requirements,

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 1                    Proceedings
 2      and then we'll have your favorite session,
 3      Q&A, and you'll be able to ask the panel
 4      questions regarding your RFP.
 5            All right.  So I'm going to
 6      introduce our panel.  To my right we have
 7      Meryl Jones.  She's the Assistant
 8      Commissioner of Capacity Building.  We
 9      have, to her right, Miguel Bonilla.  He's
10      the Director of Organization Development.
11      And to his right, we have Robert
12      Frenzel-Berra.  He's the Director of
13      Research and Program Development.  He will
14      be available for questions.  We also have
15      Natasha Mast from HHS Accelerator.  Oh,
16      she's in the back.  And she'll be going
17      over pre-qualifying and proposal submission
18      for HHS Accelerator.
19            I want to thank you for joining us
20      today.  Before I turn this conference over
21      to the panel, I would like to go over some
22      important dates and general information.
23      First I want to discuss with you our
24      mission here at DYCD.  We, the Department
25      of Youth and Community Development, or
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1   Proceedings

2   DYCD, invests in a network of

3   community-based organizations and programs

4   to alleviate the affects of poverty and to

5   provide opportunities for New Yorkers and

6   communities to flourish. Our vision, DYCD

7   strives to improve the quality of life of

8   New Yorkers by collaborating with local

9   organizations and investing in the talents

10   and assets of our communities to help them

11   develop, grow and thrive, empowering

12   individuals, strengthening families, and

13   investing in communities.

14   I'm going to go over some important

15   dates with you. This is our RFP timeline.

16   So the proposal due date is

17   March 15th, 2017, due at 2:00 p.m. in the

18   HHS Accelerator system. So again, your

19   proposals are due March 15th, 2017 at

20   2:00 p.m. in the HHS Accelerator system.

21   Please note, DYCD will not be accepting any

22   hard copies of proposals. In order to

23   respond to this RFP, you must be

24   pre-qualified in the HHS Accelerator

25   system. Again, please note the proposal

1	Proceedings
2	due date is March 15th, 2017 at 2:00 p.m.
3	in HHS Accelerator. Proposals submitted
4	after this date will not be accepted.
5	Notification of the award selections will
6	be done through the HHS Accelerator system.
7	The anticipated contract term will
8	be July 1st, 2017 to June 30th, 2020 with
9	options to renew for up to additional three
10	years. If you still have questions after
11	this pre-proposal conference, you may
12	e-mail us at
13	dycd@rfpquestions@dycd.nyc.gov. Please
14	note, in order to ensure timely responses,
15	all questions must be received no later
16	than March 6th, 2017.
17	All right. So I want to go over
18	with you an important part of your -- of
19	the RFP which is the M/WBE utilization
20	plan. So I saw some hands go up from
21	yesterday, we have some M/WBEs here, and I
22	just want to get a sense of who's here
23	because I'll be going over some things,
24	depending on where you fall. So right here
25	we have the New York City M/WBE -- and by

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 1                    Proceedings
 2        the way, who is our M/WBEs?  If you could
 3        just raise --
 4               (Hands are raised.)
 5               MR. BUNCH:  Okay.  So we got quite a
 6        few.  Okay.  Great.  All right.
 7               So I'm going to go to a slide just
 8        for you.  So there's a Schedule B in the
 9        RFP, Part II.  This is referring to the
10        participation goal which counts towards the
11        RFP and is the M/WBE participation plan.
12        So for those that raised your hands, the
13        M/WBEs, you have the partial waiver.  If
14        you decide to do a partial waiver, approval
15        must be obtained prior to proposal
16        submission.  You have to submit Part III of
17        Schedule B to DYCD for approval no later
18        than March 8th, 2017 at the e-mail address
19        you see listed there.  You also have to
20        submit Part II along about your approved
21        waiver form, Part III -- also known as Part
22        III, excuse me, must be submitted with your
23        proposal in the HHS Accelerator system.
24               If you're not going to do a partial
25        waiver, you have the full waiver option
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8

1   Proceedings

2   which is approval must be obtained prior to

3   the proposal submission. You have to

4   submit Part II of Schedule B to DYCD for

5   approval no later than March 8th, 2017 to

6   the e-mail address listed there, with your

7   approved waiver form, also known as Part

8   III, must be submitted with your proposal

9   to the HHS Accelerator system.

10   So if you're an M/WBE, you have

11   three ways to meet the M/WBE utilization

12   plan. It could be, again, participation

13   towards the RFP goal, which is part of

14   Schedule B Part II, or you can do a partial

15   waiver, as I indicated, or you could do the

16   full waiver, but you have to do one of

17   those conditions there in order to meet the

18   M/WBE utilization goal.

19   For those that are for-profit but

20   not M/WBE, if you could just raise your

21   hands.

22   (Hands are raised.)

23   MR. BUNCH: So these are your

24   non-M/WBEs but you're a for-profit.

25   For-profit, but you're not M/WBE.

1	Proceedings
2	We got some fearful people. All
3	right.
4	So that's the second category,
5	for-profit non-M/WBE. So if you meet this
6	category, similar to the M/WBE plan but a
7	little different, you have three
8	conditions. One of the three conditions
9	you have to meet, again, the participation
10	goal which is your Schedule B Part II,
11	M/WBE participation plan, or you could do
12	the partial waiver which you fill out
13	Schedule B Part II, and you fill out Part
14	III, right, or you could do the full
15	waiver, Schedule B Part III, request for
16	waiver of M/WBE participation requirement.
17	All right. So those are our M/WBEs
18	and the for-profit non-M/WBEs.
19	Who's our non-profits?
20	(Hands are raised.)
21	MR. BUNCH: All right. Non-profits.
22	So for the non-profits, Schedule B
23	is not applicable to you. So all you have
24	do is upload your 501c3 at time of proposal
25	submission. All right. So again, based on

1   Proceedings

2   wherever you fall, these are the

3   requirements you'll have to meet.

4   All right. The computer has a mind

5   of its own.

6   Let's now turn this conference over

7   to our panel. I ask that you please hold

8   any questions until the end of the panel

9   presentation. I'd like to ask Natasha Mast

10   from HHS Accelerator. She'll be going over

11   the pre-qualifying proposal submission.

12   MS. MAST: Hi, everyone. I'm shy so

13   I'm hiding in the back today. Quick

14   question -- welcome. My name is Natasha

15   Mast. I work for the Mayor's Office of

16   Contract Services. HHS Accelerator, if

17   you've heard of us before, we just joined

18   the Mayor's Office of Contract Services in

19   the past year so just wanted to let you

20   know about that change.

21   Quick question, how many people here

22   have an Accelerator account?

23   (Hands are raised.)

24   MS. MAST: Awesome. How many people

25   are pre-qualified?

1   Proceedings

2   (Hands are raised.)

3   MS. MAST: And if you don't mind,

4   how many people are still working on their

5   pre-qualifications?

6   (Hands are raised.)

7   MS. MAST: That's okay. I'm going

8   to call Jenn. She's in the back. You may

9   already be speaking to her. We're

10   available at the end if you have any

11   questions about your actual application.

12   We do run, I just wanted to let you know,

13   we are running -- we do run webinars every

14   week on getting pre-qualified, we have

15   in-person trainings, and we have guides and

16   we have resources. My team also runs the

17   help desk so you can send us an e-mail

18   clarifying -- and ask us any clarifying

19   questions as you're trying to get

20   pre-qualified. So a lot of

21   times -- sometimes people look at our

22   pre-qualification and think we want it to

23   be more complicated than we want it to be,

24   so if something seems hard or off, just ask

25   the help desk and we'll clarify if you have

1   Proceedings

2   to do that before you spend a lot of time

3   on something.

4   For the folks that have gotten

5   pre-qualified, it was okay? Hopefully.

6   So I'm going to go through. You

7   need to have an account in Accelerator.

8   You need to be pre-qualified in Accelerator

9   to view the RFP, to review any addendums,

10   and to be able to propose to these

11   opportunities. So I'm saying that sort of

12   serious. This is a change. This is the

13   first time we're doing a professional

14   service RFP through our system, but we're

15   not new at this. This might be new to a

16   lot of you in the room. We have over $3.8

17   billion for health and human service RFPs

18   that are competed for in our system on an

19   annual basis.

20   So we have thousands of

21   organizations in the City that are

22   pre-qualified already. Your

23   pre-qualification lasts -- is good for

24   three years. Any time that an opportunity

25   comes up in the service areas that you're

1   Proceedings

2   pre-qualified in, you'll get e-mails. So

3   it's a really good spot for this

4   opportunity, and it's also a really good

5   spot to be in in general if you want to

6   continue to do business with the City.

7   All proposals are due at 2:00 p.m.

8   on the deadline -- on the due date

9   electronically. So make sure it says

10   submitted, that it's not in draft, and that

11   it's in submitted status. My team will

12   call you the day before as a reminder if

13   you're still in draft. So just make sure

14   it's in submitted. There's no way if you

15   don't click submit that these -- your

16   proposal will be reviewed. You have to

17   submit. That's the only way that DYCD is

18   able to view it.

19   If you submit it, you realize you've

20   made a mistake and you have to -- you've

21   uploaded a pizza menu, you are able to

22   retract this before the deadline. You can

23   take it back, put it back into edit mode,

24   make a quick correction and resubmit it,

25   but you have to resubmit it. If you

1	Proceedings
2	realize post 2:00 p.m. you want to do that,
3	it's not possible.
4	You'll notice I put our help desk
5	e-mail. We have an e-mail that we give
6	you. We try to be as responsive as
7	possible and reply within an hour during
8	business hours to any questions you may
9	have. If you have -- if you're
10	experiencing -- you have any kind of
11	questions, just let us know. You can
12	always ask for a call. We can pick up the
13	phone and call you back. We don't provide
14	a number but we'll call you.
15	And the one thing I'll note is we
16	can only answer questions about how to use
17	our system. We are not allowed to answer
18	any questions about the actual RFP. So if
19	you -- if it's -- if it's the day of and
20	you have a clarifying question that you
21	want to ask about this opportunity, my team
22	is not able to answer those because this is
23	DYCD's opportunity so they're the
24	ones -- the only ones allowed to speak to
25	what they're looking for, so I just wanted

1   Proceedings

2   to clarify that.

3   Okay. So what is the

4   pre-qualification? In the past, if you

5   ever submitted a proposal to DYCD or any

6   City agency, you would have been asked for

7   a lot of your foundational documents in

8   hard copy, maybe three to five copies,

9   depending on the agency. What we've done

10   to make everybody's life easier, welcome to

11   this process, is we've made the

12   pre-qualification -- we've created a

13   pre-qualification system where we ask you

14   for those documents upfront, but we only

15   ask you every three years as opposed to

16   every time you propose. And with the

17   exception for the non-profits in the room,

18   we do need to see your filings on an annual

19   basis that you're up-to-date with the

20   Charities Bureau. But everybody else, you

21   just need to get pre-qualified, and you

22   just need to choose one service, Capacity

23   Building. So if you've been pre-qualified

24   with Accelerator for years but maybe not

25   for that service, go and apply for that

1	Proceedings
2	service. We just added it for this
3	opportunity.
4	The other thing I want to state is
5	if you're applying for the services, just
6	to give you a little hint, and we do not
7	need to see the full depth of your
8	experience for Capacity Building. I'm just
9	putting it out there. We just need to see
10	a form of proof, either a contract that
11	you've held or any funding in the past five
12	years where you've provided that service; a
13	staff member's resume, make sure the resume
14	says your organization; or a capability
15	statement if you don't have many
16	experience. Capability statements are very
17	rare, so don't go back to your office and
18	ask every single staff member for their
19	resume. We only need one form of proof.
20	Okay. So that's an example.
21	So once you're ready to propose,
22	you're going to go -- you're pre-qualified,
23	it's the due date, do it the day before so
24	you're not stressed. Why not? Let's do it
25	in advance. You'll go to the road map,

<center>Proceedings</center>

1

2   you'll find the opportunity for Capacity

3   Building, you'll click add new proposal.

4   You'll answer all the questions that they

5   have. They're very simple. You can start

6   your proposal today. You don't need

7   to -- you can work on it, upload documents

8   as you're ready, you can go back to it.

9   You don't need to do it all in one sitting.

10   You upload your required documents, and

11   only when you've uploaded everything that's

12   required are you able to submit.

13   Do not submit before you read

14   the -- before any addendums are released.

15   You'll want to read all the questions from

16   today, all the responses, but, you know,

17   the day before or so forth, submit your

18   proposal. And only level 2 users, which

19   probably everybody in here are able to

20   submit. So if you -- if you have an

21   administrative assistant that you gave

22   limited access to in Accelerator, you have

23   the rights to control that access. They

24   would not be able to submit this proposal

25   on behalf of your organization. So just

1   Proceedings

2   make sure. If you are the only user in

3   Accelerator, you automatically have that

4   access but some of the large organizations

5   where there's hundreds of people using

6   Accelerator have created different

7   hierarchies for access. So I'm just

8   pointing out you have to be level 2.

9   You submit the proposal, and as I

10   mentioned, you can always retract it and

11   make any adjustments all the way up until

12   the 2:00 p.m. deadline. And we will call

13   you at Accelerator the day before if you're

14   in draft and say are you really proposing,

15   kind of get a sense if you're proposing.

16   We're tracking, we're sharing with DYCD if

17   you're proposing.

18   How many people in this room have

19   proposed before?

20   (Hands are raised.)

21   MS. MAST: I'm just curious. Okay.

22   That's great. Okay. So this is not new to

23   most of you. That's great.

24   And for the folks if this is new or

25   you're not pre-qualified, my team's job is

 1   Proceedings

 2   to get you through this process and to help

 3   you, so Jenn and I are here until the end

 4   and you can ask us any questions or

 5   follow-up with our help desk, and it's

 6   probably one of us answering your questions

 7   on the other side. Thank you.

 8   MS. JONES: So good afternoon,

 9   everyone, and welcome. I'm really glad to

10   see so many of the individuals who

11   participated in yesterday's networking

12   session. I'm glad you took me up on my

13   offer and came down, and I hope you'll have

14   an opportunity to mingle with others at the

15   end to see who's in the room.

16   So, good afternoon. I am Meryl

17   Jones, Assistant Commissioner for Capacity

18   Building and Professional Development, and

19   on behalf of DYCD, I welcome you to this

20   Pre-Proposal Conference for Capacity

21   Building Services, Strengthening

22   Organizations.

23   So how do we define Capacity

24   Building? We defined it as any activity,

25   such as strategic planning, board

1   Proceedings

2   development, or improvements in program

3   practices or technology, that increases an

4   organization's program outcomes or

5   sustainability. Through its Capacity

6   Building Division, DYCD fosters continuous

7   improvement and programmatic learning at

8   professional development among its funded

9   non-profits to help them become more

10   effective service providers.

11   This particular RFP responds to the

12   unique organizational needs facing

13   DYCD-funded service providers as they

14   navigate complex funding, programmatic and

15   operational structures in a frequently

16   changing labor and demographic landscape.

17   So this is the mission, Capacity

18   Building, and I think what's most important

19   to point out is of course our mission is to

20   strengthen the capacity of our

21   organizations that we -- that are funded by

22   us, but most importantly we want to make

23   sure that these agencies are ready, willing

24   and able to benefit from our services.

25   Additionally, the goals of our

1   Proceedings

2   particular unit are also to increase

3   non-profit ability to achieve positive

4   outcomes for their participants, and to

5   really support the organizations funded by

6   us through continuous quality improvement.

7   Over the past decade, DYCD has invested in

8   capacity of non-profits as a strategy for

9   ensuring that youth and families receive

10   high-quality effective services.

11   So these are the different types of

12   capacity building that we support. These

13   are the various modalities which include

14   coaching, consulting, training,

15   conferences, publication. We've also

16   developed partnerships and some really

17   amazing university partners. So we have

18   FDC training, we oversee the cultivating

19   curiosity initiative, we've created a

20   number of college-based partnerships which

21   have supported staff at our funded agencies

22   in terms of achieving their degrees, and we

23   also work -- provide training to

24   various -- our colleagues here at DYCD and

25   our various program areas.

1   Proceedings

2   The Capacity Building Unit is

3   responsible for professional development,

4   and organizational development and

5   technical assistance, so our team currently

6   oversees a portfolio of approximately -- of

7   14 technical assistance providers

8   supporting 24 content areas and our budget

9   is approximately $6 million annually. We

10   also lead many special projects and pilots

11   in collaboration with our colleagues here

12   in the agency that are customized to the

13   needs of that particular portfolio, and we

14   are also mindful of and facilitate a number

15   of strategic partnerships that -- with

16   resource-rich organizations that can help

17   enhance programs. We've developed Citywide

18   advanced that engage CBOs with real

19   innovate programming and model exemplary

20   practices.

21   To support our Capacity Unit

22   strategies, we leverage the expertise of

23   technical assistance partners to offer

24   community-based organizations -- so we

25   leverage the expertise of our technical

1	Proceedings
2	assistance providers to offer
3	community-based organizations support from
4	leaders in the field. Hundreds of
5	organizations have benefited from a range
6	of services such as intensive
7	organizational development consulting,
8	focusing on organizational development,
9	board development, financial management,
10	financial planning, program design and
11	implementation, as well as performance
12	management. We've provided training on key
13	topics in youth and family services and
14	resources for staff on a range of topics
15	that support their program requirements.
16	On average, we training for -- we provide
17	training for over 5,000 individuals a year.
18	There are usually wait lists for our
19	trainings, and our technical assistance
20	providers facilitate anywhere from 15 to 20
21	professional development activities per
22	month.
23	Our current approach to capacity
24	building includes incorporating adult
25	learning principles, an increased focus on

24

1   Proceedings

2   multiple-level staff support. It is vital

3   that capacity building reflects an

4   understanding of the key role played by

5   staff at all organizational levels. We

6   partner with content specialists and field

7   experts. We promote quality by focusing on

8   more intensive pure-based learning

9   opportunities, and we integrate -- the

10   integration of coaching as well in terms of

11   our followup services. This is really key

12   because all the services that include

13   coaching emphasize the connection between

14   capacity building activity and program

15   practice. And we encourage strategic

16   partnerships among our providers,

17   especially in service and funded agencies

18   that may want to leverage their limited

19   resources.

20   Outcomes are also important to us,

21   and as such, we have implemented CV

22   Advance, and that's our online management

23   tool which enables analysis of critical

24   data to assess trends in our capacity

25   building services among our funded TA

1   Proceedings

2   providers. And by putting together

3   practitioners, researchers and other

4   experts to strengthen organizations and

5   programs, DYCD strengthens organizations by

6   investing in their planning, leadership

7   development and infrastructure. We enhance

8   program quality by building frontline and

9   supervisory staff knowledge and skills, and

10   we promote learning and continuous

11   improvement.

12   The investment in capacity building

13   has helped us amend DYCD standing, and as a

14   field leading government agency, that

15   creates exemplary program models and

16   resources, strengthens our organizations,

17   and strives to continuously improve

18   services for youth and families. By

19   building on these past successes, the

20   Capacity Building Division will continue to

21   provide programmatic technical assistance

22   services that focuses on issues of national

23   multi importance, strengthen services for

24   our participants, and increase positive

25   outcomes.

 1   Proceedings

 2   So DYCD's Capacity Building Unit

 3   will continue to bolster community-based

 4   organizations in the field by offering

 5   organizational development technical

 6   assistance services, creating leadership

 7   development opportunities, preparing staff

 8   to be effective managers and supervisors,

 9   encouraging workers to pursue their

10   certifications and college degrees. We

11   promote peer and action learning networks,

12   and develop partnerships and other

13   resources that support program equality.

14   Now I'm going to turn it over to

15   Miguel. He's going to take you through the

16   RFP service options.

17   MR. BONILLA: Thank you, Meryl.

18   Hello. Good afternoon. Do you guys

19   have your coffee? You're ready for this?

20   My name is Miguel Bonilla. I'm

21   going to take you through the four service

22   options. So there's four separate

23   competitions, just to be clear. It's one

24   RFP but you would have to apply separately

25   for each one. So I'm going to take you

1   Proceedings

2   through all the four service options.

3   So the first one is Board

4   Governance, the next one is Fiscal

5   Management, Fund Development and

6   Organization Development. Then I'm going

7   to also tell you what the amounts are for

8   each service option.

9   So under Board Governance, what

10   we're looking for is, if you work in the

11   field of board governance, you know that

12   it's critical to have strong board

13   governance in order to help an organization

14   pursue its mission and services. We know

15   that engaged boards are more likely to

16   evaluate organizational performance,

17   oversee finances and raise money. We're

18   looking for a consultant who has the

19   expertise and knowledge to help board

20   leadership understand its fiduciary

21   responsibility, expectations for the board,

22   and evaluate the executive director. So

23   that's what we're looking for in that

24   service option.

25   For Fiscal Management, we know that

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 1                        Proceedings

 2         strong fiscal management is needed to hire

 3         staff appropriately, manage organizational

 4         growth, and deliver high-quality services.

 5         We're looking for a contractor that would

 6         help non-profit leaders create

 7         program-based budgeting, monitor and

 8         understand finance functions, develop and

 9         maintain appropriate fiscal controls, and

10         help boards understand their fiscal

11         position, among other things.

12              Under Fund Development, we realize

13         that it's important to have a plan to

14         create cash reserves.  A non-profit should

15         have diversified funding streams and have

16         the skilled staff to be able to raise money

17         for your organization.  A contractor would

18         help non-profit leaders plan for diverse

19         funding base, identify and recruit

20         appropriate development staff and engage

21         board in fundraising.

22              Under Organizational Development, we

23         know that it's critical for organizations

24         to have skills and practices that bring

25         together stakeholders to plan and execute
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 1                      Proceedings
 2       their work, promote healthy human resource
 3       practices, and manage conflict well.
 4       Contractor would help non-profit leaders
 5       with strategic planning, establishing
 6       internal monitoring systems, effective
 7       management and supervision practices.
 8            These are the service options and
 9       amount per year and the total for three
10       years.  As Keith mentioned, this is what we
11       would have for the next three years with an
12       option to renew after the -- for an
13       additional three years after that.
14            These are some resources
15       that -- some resources to -- if you want to
16       find out more about us.  On our website,
17       there's an area where we've listed a lot of
18       documents that tell you more about
19       the -- our unit, the Capacity Building
20       Unit, and there's also a link to a social
21       media policy.
22            MR. BUNCH:  Thank you to Miguel and
23       Meryl for going over some information
24       regarding Capacity Building, RFP content
25       areas.
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1   Proceedings

2   I'd like to go over post-award

3   requirements. So we have general

4   information and regulatory requirements.

5   So I just want to go into responsibility

6   determinations, very important. Please be

7   advised that it's a requirement for all

8   contractors to be determined responsible in

9   the post-award phase, therefore, please

10   make sure your vendex filings are

11   up-to-date, your charities filings are

12   current, and ensure that any outstanding

13   liens or adverse information has been

14   resolved. Unresolved issues often cause

15   significant delays in the post-award

16   process. Also to mention the Notice for

17   Proposer Subcontractor Compliance, and the

18   HireNYC Rider.

19   I also want to go over the insurance

20   requirement. So the contractor must

21   demonstrate that necessary insurance

22   coverage -- the contractor must demonstrate

23   that necessary insurance coverage,

24   commercial general liability insurance of

25     $1 million per occurrence, and $2 million

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 1                    Proceedings

 2      aggregate; motor vehicle liability

 3      insurance of $5 million, if applicable; and

 4      workers' compensation insurance is in place

 5      from the first day of the contract by

 6      providing an original certificate of

 7      insurance naming the City of New York,

 8      together with its officials and employees,

 9      as an additional insured.  DYCD will not be

10      able to proceed with any processing of an

11      awarded contract until it has obtained

12      proof of the necessary insurance coverage.

13           All right.  So I think this is your

14      favorite session of the day.  So we have

15      the Q&A.  At this time, we'll have the

16      session.  Please note the session is only

17      for purposes regarding the RFP.  Moreover,

18      this is your only opportunity to ask the

19      panel questions.  Once the Q&A session

20      ends, the panel will not be able to take

21      any questions, therefore, if you want to

22      ask the panel any questions, this is your

23      opportunity to do so.

24           Once again, please make sure all

25      questions pertain to this RFP.  Anyone who
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32

2   wishes to ask a question or needs further

3   clarification, you're going to line up next

4   to me to my left in front of this

5   microphone. Please be sure to state your

6   name and the name of your agency, and

7   reference the page of the RFP that pertains

8   to your question.

9   Anyone have questions regarding the

10   RFP?

11   MS. LEVINE: I'm from Cause

12   Effective, Judy Levine. Question about

13   staffing, RFP -- question 16 in the RFP.

14   You want the roles, qualifications,

15   responsibilities and job expectations for

16   staff positions. Do you want frontline,

17   consulting staff and administrative, and

18   program board initiative staff or just the

19   frontline service provider staff? It's

20   page 4. It's part of Attachment B.

21   MS. JONES: So for us, it is related

22   to the staff that would be responsible for

23   the administration of the particular

24   contract.

25   MS. LEVINE: So administration as

1   Proceedings

2   well as the -- okay.

3   I have a couple of other questions

4   but if other people want to go ahead of me

5   they could.

6   Okay. The one right before that, it

7   says assume a single DYCD-funded

8   organization, I guess it's service option

9   4-B. I'm assuming when you said 2,400

10   characters, it's not 30 words but it's 300

11   words?

12   MR. BONILLA: That's correct.

13   MS. LEVINE: Okay. Just making sure

14   you don't want seven questions in 30 words.

15   Moving to the next page, Evaluation

16   of Capacity Building. When you're

17   referring to question 21, if your capacity

18   building service are subject to an external

19   assessment, is that only a DYCD assessment

20   or if we have done -- had an external

21   evaluator evaluate our programs, can we

22   submit that?

23   MS. JONES: Yes. You just may not

24   have had any DYCD contracts so...

25   MS. LEVINE: Right. We haven't.

1   Proceedings

2   Okay.

3   And last thing, you talk about

4   control of the training facility and what

5   you mean by that, and a training facility

6   of 50 or a training facility in which we do

7   consulting in groups of 20? What do you

8   mean by that?

9   MR. BONILLA: Control of your

10   facility so --

11   MS. JONES: I'm sorry. Could you

12   repeat the question? You said control in

13   terms of -- space in terms of 20 or 50?

14   MS. LEVINE: Yeah. I mean, we have

15   coaching space in space for 20 training at

16   our site. If you want us to do a seminar

17   for 100, we're going to have to look

18   outside, and if so, should we indicate how

19   we would do so if you would want so?

20   MR. BONILLA: It's what you would

21   plan to do so -- but you should have a

22   lease. So I don't think the number matters

23   as much as you having control over it and

24   being able to demonstrate proof that you

25   have control over your space. So whether

1	Proceedings
2	it's a lease, whether it's some kind of
3	written agreement, you have to be able to
4	demonstrate that you have control over your
5	facility. So the number at this point
6	doesn't matter because we wouldn't -- you
7	know, if you got the contract, we would
8	negotiate that later.
9	MS. LEVINE: Okay. Those are my
10	questions.
11	MR. SHAH: Sanjay Shah, Paragon
12	Management Group. My question is sort of
13	general about RFP. I understand you're
14	going to select four vendors out of this.
15	And the question I have is four vendors, is
16	it going to be one vendor in each area, or
17	how is it?
18	MS. JONES: We anticipate one vendor
19	per competition, one vendor per competition
20	area.
21	MR. SHAH: So one for fiscal and one
22	for each service?
23	MS. JONES: Yes.
24	MR. SHAH: Okay. Thank you.
25	MS. KINCH: Good afternoon. I'm

1   Proceedings

2   Cheryl Kinch from Kinch Law Group. I have

3   a question regarding mechanism. Do you

4   have a mechanism whereby I can access a

5   list of other perspective responders that

6   may be interested in teaming?

7   MS. JONES: Natasha, is that

8   available through Accelerator?

9   MS. MAST: I'm coming. Sorry.

10   Not -- I'm looking to see if Dana is

11   here. So how to match make between -- we

12   do have a -- if you are pre-qualified, and

13   even if you're not, if you have an account

14   in Accelerator, you can go to the third tab

15   for this opportunity and you can see who's

16   pre-qualified in the whole City for this

17   opportunity. So you can see everybody

18   who's pre-qualified for Capacity Building,

19   which is actually a reasonable number and

20   we provide the phone numbers for every one

21   of those organizations.

22   But do you know, if they're

23   interested, is it on the sign-in sheet

24   or --

25   MS. CANTELMI: So, Dana Cantelmi

1   Proceedings

2   from DYCD. We will also be posting the

3   attendance roster on our website along with

4   the transcript, so you will get that

5   information. It probably will not be up

6   until probably a week from now, but it will

7   be on our website.

8   MS. MAST: Do we want to -- would

9   you want to -- is there anybody interested

10   here? Like could we just have hands or do

11   we not want to do that?

12   MS. JONES: Well, I had asked Keith

13   and he said at the end when we've

14   officially closed the pre-proposal

15   conference, we would encourage each person

16   who wants to stand up, introduce themselves

17   and the contact area that they are

18   interested in so that folks can know who's

19   in the room at the moment and maybe some

20   matchmaking can happen after, but it has to

21   happen after we officially close the Q&A.

22   MR. SHAH: But you are going to

23   share the list of attendees today, right?

24   Because that would be very helpful.

25   MS. JONES: Yes. It says it right

1   Proceedings

2   there.

3   MS. MAST: Yeah, it's going to be

4   shared, but we also need to remember,

5   Capacity Building was just added to HHS

6   Accelerator in the past month, so I would

7   say the majority of folks that are

8   pre-qualified for that service are all

9   sitting here. So I think that that would

10   definitely be a great resource that you can

11   go to immediately after today, go into the

12   system and we provide the contact

13   information for those organizations so you

14   all have access to each other's because I

15   don't think you would have gotten yourself

16   pre-qualified if you weren't interested in

17   this.

18   UNIDENTIFIED SPEAKER: Excuse me.

19   What if you're not pre-qualified?

20   MS. MAST: Not everybody's

21   pre-qualified, I get that, but it's just a

22   starting point for the folks that have

23   gotten pre-qualified. And I should

24   mention, about a fourth of the room

25   mentioned that they're not pre-qualified

1   Proceedings

2   yet. Let's say you get pre-qualified in

3   two days, your name's on that list in two

4   days. So that's a living, breathing list

5   in Accelerator for who's pre-qualified for

6   Capacity Building.

7   MS. JONES: And in addition, as you

8   see, the attendance rosters will be on the

9   website for viewing. So Dana says that

10   goes up in a week, you compare the

11   attendance roster versus who's

12   pre-qualified so you'll know who is in the

13   room today.

14   MS. PUGLISI: So I actually have a

15   followup question on what you --

16   MR. BUNCH: If you could just come

17   up to the mic so we can get that on record.

18   MS. PUGLISI: Sure. So the --

19   MR. BUNCH: Name and organization.

20   MS. PUGLISI: Oh, I'm sorry. Maria

21   Puglisi, Right Tree Consulting, and I'm a

22   WBE and I am pre-qualified, which is great,

23   in Accelerator. So my question is, is when

24   you go to Accelerator and look at firms, I

25   don't recall if you could tell if someone

1   Proceedings

2   is an M/WBE or not.

3   MS. MAST: I don't think you can

4   tell if they're an M/WBE but you can tell

5   if they are for-profit or not-for-profit,

6   but you cannot tell if they're an M/WBE as

7   of -- in Accelerator. But we do share

8   their corporate status, which is an

9   indicator.

10   MR. BUNCH: Any other questions?

11   MS. ZHU: Good afternoon. Thank you

12   for your presentations. So my question is

13   about the four vendors that you're going to

14   select. Are those vendors -- will those

15   vendors who have previous experience of

16   working with other vendors get higher

17   scores on their RFPs? Like do you look for

18   their previous history, you know, their

19   relationship of working with each before

20   before you select those four vendors?

21   MS. BONILLA: While Bob is looking

22   for that, we should mention there's a state

23   directory of certified M/WBE vendors. If

24   you're looking for vendors, that's another

25   place to look. I don't know if the City

1   Proceedings

2   has a directory as well but there is a

3   State. If you Google New York State M/WBE

4   directory, you'll find the site.

5   MS. CANTELMI: So it is an open

6   competition. The structured proposal form

7   does ask specific questions on your

8   experience, so obviously the way that you

9   demonstrate your experience on the

10   structured proposal form will ultimately

11   determine how many points an evaluator will

12   give you. So it really is up to the way

13   you're writing our proposal, so that way

14   the evaluator who's actually reading it can

15   understand and know what capabilities your

16   organization has to run any of those

17   competitions that you're applying for, but

18   it is an open competition so anyone can

19   apply and they will get the points that the

20   evaluators feel appropriate as however they

21   actually filled out the structured proposal

22   form.

23   MS. ZHU: Yeah. I was just curious

24   like just in case there's some ties and

25   will you select the four vendors who have

1   Proceedings

2   worked before than those who haven't had

3   experience?

4   MS. CANTELMI: So there's a basis

5   for award in the actual RFP. We do

6   typically go with whoever is the highest

7   score, however, if there is a tie, there

8   will be additional steps that would have to

9   be taken, but this at point in time we

10   don't know who's competing or what the

11   scores and things like that will be, but

12   there is a basis of award that does outline

13   the steps that would be taken for this

14   selection.

15   MS. ZHU: Thank you.

16   MS. GOODRIDGE: Thank you. Sandra

17   Goodridge, Social Strategies Group. Thank

18   you for your presentations. I have a

19   question. My company is an M/WBE. Can an

20   M/WBE bid twice, and this is what I mean by

21   that, can an M/WBE bid in a category and

22   then also team with another business to

23   help them or non-profit to help them meet

24   their M/WBE goals? Is that permissible?

25   MS. BONILLA: Yes, that's -- you can

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 1                         Proceedings

 2      submit several proposals.  That's correct,

 3      right, Dana?

 4            MS. CANTELMI:  Yeah.  So you can

 5      submit a proposal, if you feel that you're

 6      able to do the work yourself, you can

 7      definitely submit a proposal.  We are not

 8      prohibiting anyone from building

 9      subcontractor relationships and helping

10      other organizations out, so that's totally

11      up to you.  There's no limit.

12            MS. GOODRIDGE:  Okay.  Thank you.

13            MS. SEN:  Hello.  I'm Suhrita Sen

14      from Infrastructure Advisors.  My question

15      is for the three options you explained for

16      the M/WBEs, can you explain in what

17      circumstances should we choose a partial

18      waiver versus a full waiver versus going

19      for the full?  I wasn't clear on that.

20            MR. BUNCH:  Right.  So let's say --

21            MS. CANTELMI:  So for the M/WBE

22      waiver, just to clarify a point, if you are

23      a certified M/WBE, your participation in

24      the program will count towards that goal,

25      so you're going to be filling out Part II
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1   Proceedings

2   and showing that your participation in that

3   program will meet that goal. If you are a

4   for-profit that is not a certified M/WBE,

5   then you would be filling out Part II and

6   it's really up to you because if you are

7   saying that you're going to meet 15 percent

8   of that goal, and what that means is that

9   you're going to be subcontracting out 15

10   percent of the work with a certified M/WBE,

11   then it's really up to you. You would have

12   to figure out whether it's a full waiver or

13   a partial waiver. So say, for example, you

14   know that you have the capability to do the

15   work completely yourself, you're not going

16   to subcontract any of the work, you will

17   then be seeking a full waiver because you

18   will not be able to meet that 15 percent

19   participation goal.

20   So again, if you're able to do the

21   work yourself and you're not going to seek

22   any subcontracting if you are awarded the

23   contract during the term of the contract,

24   you will be seeking a full waiver if you

25   are a for-profit organization. If you are

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2   a for-profit who says I want to meet 5

3   percent of the goal, then you would be

4   seeking a partial waiver. And again, all

5   waivers have to be submitted to DYCD and

6   approved before the due date of the RFP and

7   it has to be submitted with the proposal in

8   Accelerator.

9   If you are a non-profit, then you're

10   exempt from the M/WBE participation but you

11   would have to upload your 501c3 so that we

12   will know when we're doing our responses to

13   check that the Schedule B did not apply.

14   So it's really up to organizations

15   to figure out whether or not they can do

16   this work completely themselves. And

17   again, this is for the for-profits that

18   aren't certified under M/WBEs, can you do

19   the work completely yourself and you're not

20   seeking any subcontracting. But again, we

21   do have and encourage a 15 percent

22   participation goal for this RFP.

23   UNIDENTIFIED SPEAKER: So just to

24   summarize then, for M/WBEs, they

25   automatically meet the goal so there is no

1	Proceedings
2	three options, there's only one option.
3	MS. CANTELMI: Right. So for
4	M/WBEs, you're meeting that participation
5	goal. You're not going to be seeking a
6	waiver because you will be filling out that
7	Part II and you're still required to upload
8	a Part II with your proposal submission but
9	you're not seeking an actual waiver.
10	If you can just come up because
11	we're transcribing this pre-proposal
12	conference and we just want to make sure
13	that we're getting everyone's name and
14	organizations on the transcript.
15	UNIDENTIFIED SPEAKER: I have a
16	question to followup. You said you
17	encourage M/WBE participation. By
18	definition, if you're seeking a waiver,
19	you're basically saying that you
20	cannot -- you're not using or cannot --
21	MS. CANTELMI: We're leaving it up
22	to the organizations. Again, we're looking
23	for someone that can provide the services,
24	that have the capacity to provide the
25	services. We just want to make sure that

1   Proceedings

2   we're getting someone that can meet the

3   goals.

4   UNIDENTIFIED SPEAKER: Understood,

5   but from a compliance perspective, how much

6   effort is made to not only encourage, but

7   to say to responsive organizations here,

8   you're looking for a waiver, but here is a

9   list of M/WBEs?

10   MS. CANTELMI: So I don't know how

11   many folks are looking for waivers and I

12   don't know how many folks that are

13   certified M/WBEs that are going to be

14   applying for this a hundred percent, so

15   it's really hard for me to --

16   UNIDENTIFIED SPEAKER: Understood,

17   but my question is going forward, if you

18   do, let's say half of the applicants come

19   to you and say we're seeking waivers, I'm

20   trying to understand how much effort is put

21   into saying to them --

22   MS. CANTELMI: So organizations

23   that --

24   UNIDENTIFIED SPEAKER: -- here's a

25   list, you don't need a waiver because

1   Proceedings

2   here's as list of qualified M/WBEs that can

3   provide this service.

4   MS. CANTELMI: So again, it goes

5   back to whether or not the provider that's

6   proposing can provide the service. So they

7   would actually have to fill out all of Part

8   III and give references. Like it's not

9   just filling out a form. Like they have to

10   go through a review process, we're checking

11   references, we're following up with MOCS,

12   so it is a process that has to take place.

13   So again, I mean, if an M/WBE wants

14   to apply to the RFP, then definitely -- you

15   know, and again, I don't know who's going

16   to be submitting waivers and if they do

17   submit a waiver, we will be following

18   the --

19   UNIDENTIFIED SPEAKER: I'm going to

20   try one more time.

21   MS. CANTELMI: So maybe Bob will --

22   MR. FRENZEL-BERRA: What I'm hearing

23   is all proposers can have the option to

24   provide all the services themselves or to

25   subcontract out part of their services and

1   Proceedings

2   indicate that in the proposal. So if an

3   organization plans to do all the work

4   itself then -- and not subcontract, then

5   they can apply for a waiver on that basis.

6   If they subcontract, then they're, for

7   certain applicants, for-profits, they then

8   have to consider the 15 percent.

9   UNIDENTIFIED SPEAKER: Okay. My

10   comment -- I have a further comment. As an

11   attorney who has extensive compliance

12   background, my comment is how much effort

13   is going to be made to adhere to the

14   compliance for M/WBE goals because if there

15   isn't sufficient effort in seeing that

16   there is adherence to those goals, then any

17   applicant can say oh, we're applying for a

18   waiver, then the M/WBE goal is meaningless.

19   So that's my point.

20   UNIDENTIFIED SPEAKER: I think if I

21   were to add a phrase is, is there an

22   evaluation criteria for compliance with the

23   M/WBE goal? That is the bottom line. How

24   many points are awarded?

25   MS. CANTELMI: So there is no points

1   Proceedings

2   awarded specifically to --

3   UNIDENTIFIED SPEAKER: So then that

4   means there is no -- that this is just

5   not --

6   MS. CANTELMI: So again, if there's

7   comments or anyone that wants to come up,

8   you do have to come up because they are

9   transcribing.

10   MS. BINUA: Good afternoon,

11   everyone. I'm sorry for my voice. I am

12   from Padilla & Company. I just want to

13   share with you. We have been doing audits

14   for Local Law 1, okay, for it to require

15   all government contracts to have the

16   participation goal of the M/WBE. So I

17   think what you need to have a waiver if you

18   are already an M/WBE, then that's the time

19   that you can request for a waiver because

20   you can do the job, but if you are not an

21   M/WBE, you have to satisfy the

22   participation goal. Okay. That is based

23   on our audit of the Local Law 1.

24   MS. CANTELMI: So again, so the

25   instructions for the M/WBE requirement and

1   Proceedings

2   the goal is in the RFP. It's outlined.

3   You know, we can take additional questions

4   after, but this is -- there is a 15 percent

5   goal on the RFP. We encourage and would

6   love to have M/WBEs in our program and if

7   M/WBEs can do the full program without

8   subcontracting a hundred percent, that's

9   great. We're not saying that folks should

10   apply for a waiver. We're holding -- we're

11   allowing folks to network at the end of

12   this to see if it could, you know, work,

13   but again, if they are applying for a

14   waiver, we will follow the steps as

15   outlined in the RFP.

16   If you could come up and state your

17   name.

18   MR. SHAH: Sanjay Shah, Paragon

19   Management Group. I think what others have

20   been saying and I will try to rephrase it

21   in a different way, there has to be points

22   assigned to the meeting of the M/WBE goal.

23   We do work with the federal agencies and

24   when they do set asides, there are projects

25   sometimes, they are going to both small

1	Proceedings
2	firms and large firms but they set aside
3	like ten points for those who are, you
4	know. So unless you assign points that are
5	in the determination, I think all these
6	goals, and I understand what you're talking
7	about, has no practical, you know, impact,
8	number one.
9	Number two, I'm actually in the
10	process of pre-qualification and we should
11	be submitting in a day or two, but I
12	already saw a number of firms so --
13	MS. MAST: What?
14	MR. SHAH: A number of firms that
15	are non-profits that are pre-qualified in
16	this thing. If any of them are M/WBE, I
17	think the onerous should be on those
18	seeking waiver, why they have not used
19	pre-qualified firms, meaning that there
20	should be a higher bar for them --
21	MS. CANTELMI: Non-profits can't be
22	certified M/WBEs though.
23	MR. SHAH: No, not non-profit. I'm
24	talking about for-profit.
25	So if they are seeking waiver, then

1   Proceedings

2   there should be a higher bar for them to

3   explain why they want a waiver when they

4   are pre-qualified M/WBE.

5   MS. CANTELMI: So point definitely

6   taken, but for this RFP, as I mentioned, we

7   did not put any point preference, but

8   definitely your point taken.

9   MR. SHAH: But it is not too late to

10   do that, that's what we are saying. It's

11   not too late to do that. All this talk

12   about promoting and M/WBE firms, ultimately

13   it comes down to whether or not it is, you

14   know, in the points, it is in the scoring,

15   otherwise it's talk. I'm sorry. I am

16   saying it bluntly but that's what it is.

17   UNIDENTIFIED SPEAKER: And I'm just

18   going to add, I was in the City

19   Comptroller's meeting for M/WBEs and -- I'm

20   sorry. New York City, the last time was

21   audited had a four percent number for M/WBE

22   compliance and it has gone down to two

23   percent, so just to share that when you

24   take out RFPs, just to keep that in mind.

25   It's quite pathetic to start with.

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2   MR. BUNCH: All right. If you have

3   a question, please feel free to come to the

4   microphone. Only if you have a question,

5   please.

6   Can you hear me? So I'll speak

7   louder.

8   So if you have a question regarding

9   the RFP, you're free to come up.

10   MS. RICH: Hi. Susan Rich with

11   LIFMS. We're a WBE certified New York City

12   and New York State CPA practice. We

13   currently consult with several DYCD CBOs.

14   My first question is, is that a good thing

15   or a bad thing?

16   MS. JONES: If they're happy with

17   your work, I'm assuming it is.

18   MS. RICH: Is it a conflict of

19   interest if we're consulting with some DYCD

20   CBOs?

21   MS. JONES: No.

22   MS. RICH: Okay. And just -- my

23   question is, if you're truly committed to

24   the clients of these CBOs, the DYCDs, which

25   are minorities and underserved populations,

1   Proceedings

2   why in the world doesn't DYCD put its money

3   where its mouth is and implement a no

4   waiver policy on M/WBE just like New York

5   State OCFS has done, like many other

6   agencies? You're progressive and you're

7   making so much progress. I would really

8   take this back to your leadership and tell

9   them the feedback you got here from

10   everybody, that we think it's somewhat

11   hypocritical not to provide services to

12   minorities, and then when they own firms

13   like many of these people here and they're

14   trying to build business, that you're not

15   supporting them.

16   MS. CANTELMI: Again, so I hear

17   everyone and note definitely taken. The

18   Schedule B and the waiver forms are not

19   developed by DYCD. This is an ongoing

20   effort for this administration and we will

21   bring that back, but for purposes of this

22   RFP, this is what has been set but

23   definitely we will take it back. We hear

24   you all.

25   MS. RICH: The RFP can be changed

1   Proceedings

2   during the Q&A process.

3   MS. CANTELMI: If we change anything

4   in the RFP, an addendum will be released

5   but as of right now, that's what is stated.

6   MS. ZHU: Hi. Cheng Zhu with Humor

7   Leadership Consulting, specializing in

8   providing leadership and organizational

9   development and training services. So can

10   a vendor be a prime and a sub for proposals

11   at the same time, like a prime for one area

12   and then sub for another?

13   MS. JONES: Yes. Someone else asked

14   that question.

15   MS. ZHU: Oh, okay. Great. Thank

16   you.

17   MS. DAVIDOWITZ: Hello. Merna

18   Davidowitz, JCCGCI. I have a question.

19   There are four competitions and you're

20   choosing four awards. Are you committed

21   that each competition will have a different

22   awardee, or as I noticed in other

23   competitions, sometimes the same

24   organization is getting two or three?

25   MS. CANTELMI: So again, we don't

1   Proceedings

2   know who is applying. We do have a base

3   for award, the right to see if there is any

4   concerns about demonstrating capacity, but

5   we are not at this time stating whether or

6   not one vendor will be awarded multiple

7   competitions or one competition each. It

8   all depends on who's applying and whose

9   scores that are being received.

10   Anyone else?

11   (No response.)

12   MR. BUNCH: Once, twice, three

13   times.

14   (No response.)

15   MR. BUNCH: All right. If there's

16   no questions, please be on the lookout for

17   any addendums that may be released in HHS

18   Accelerator. Also, please remember the due

19   date for proposal submission is

20   October 6th, 2017 -- excuse me. Please

21   note the proposal due date is

22   March 15th, 2017. Again, the proposal due

23   date is March 15th, 2017 at 2:00 p.m. in

24   the HHS Accelerator system. And again,

25   please be on the lookout for any addendums.

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2   I want to thank everyone for

3   attending, and this concludes our

4   pre-proposal conference.

5   (Time noted: 3:10 p.m.)

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2   C E R T I F I C A T E

3

4   STATE OF NEW YORK   )
) ss.:
5   COUNTY OF RICHMOND) ss:

6

7   I, JENNIFER CASSELLA, a Notary Public

8   within and for the State of New York, do hereby

9   certify:

10   I reported the proceedings in the

11   within-entitled matter, and that the within

12   transcript is a true record of such proceedings

13   to the best of my ability.

14   I further certify that I am not related

15   to any of the parties to this action by blood

16   or marriage; and that I am in no way interested

17   in the outcome of this matter.

18   IN WITNESS WHEREOF, I have hereunto set

19   my hand this 19th day of February, 2017.

20

21   _____

22   JENNIFER CASSELLA

23

24

25

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2   A P P E A R A N C E S

3   KEITH BUNCH, Assistant Deputy Agency Chief
    Contracting Officer

4
    NATASHA MAST, HHS Accelerator

5
    MERYL JONES, Assistant Commissioner

6
    MIGUEL BONILLA, Director of Organization Development

7
    ROBERT FRENZEL-BERRA, Director of Research and

8   Program Development

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1   Proceedings

2   MR. BUNCH: Good afternoon,

3   everyone. Good afternoon. Thank you for

4   your patience. I see some familiar faces

5   from yesterday.

6   Raise your hands if you went to the

7   M/WBE event yesterday.

8   (Hands are raised.)

9   MR. BUNCH: Okay great. Glad you're

10   here today. Thank you.

11   On behalf of Commissioner Chong, we

12   would like to welcome you to the Department

13   of Youth and Community Development's

14   Pre-Proposal Conference for Capacity

15   Building Services. My name is Keith Bunch,

16   Assistant Deputy Agency Chief Contracting

17   Officer.

18   So here's our agenda for today.

19   We'll have a panel introduction, RFP

20   timeline requirements. We'll be going over

21   some pre-qualifying and proposal submission

22   information from HHS Accelerator. We'll go

23   into detail about capacity building. We'll

24   go forward with RFP content areas. At the

25   end, we'll discuss post-award requirements,

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 1                       Proceedings
 2      and then we'll have your favorite session,
 3      Q&A, and you'll be able to ask the panel
 4      questions regarding your RFP.
 5              All right.  So I'm going to
 6      introduce our panel.  To my right we have
 7      Meryl Jones.  She's the Assistant
 8      Commissioner of Capacity Building.  We
 9      have, to her right, Miguel Bonilla.  He's
10      the Director of Organization Development.
11      And to his right, we have Robert
12      Frenzel-Berra.  He's the Director of
13      Research and Program Development.  He will
14      be available for questions.  We also have
15      Natasha Mast from HHS Accelerator.  Oh,
16      she's in the back.  And she'll be going
17      over pre-qualifying and proposal submission
18      for HHS Accelerator.
19              I want to thank you for joining us
20      today.  Before I turn this conference over
21      to the panel, I would like to go over some
22      important dates and general information.
23      First I want to discuss with you our
24      mission here at DYCD.  We, the Department
25      of Youth and Community Development, or
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1   Proceedings

2   DYCD, invests in a network of

3   community-based organizations and programs

4   to alleviate the affects of poverty and to

5   provide opportunities for New Yorkers and

6   communities to flourish. Our vision, DYCD

7   strives to improve the quality of life of

8   New Yorkers by collaborating with local

9   organizations and investing in the talents

10   and assets of our communities to help them

11   develop, grow and thrive, empowering

12   individuals, strengthening families, and

13   investing in communities.

14   I'm going to go over some important

15   dates with you. This is our RFP timeline.

16   So the proposal due date is

17   March 15th, 2017, due at 2:00 p.m. in the

18   HHS Accelerator system. So again, your

19   proposals are due March 15th, 2017 at

20   2:00 p.m. in the HHS Accelerator system.

21   Please note, DYCD will not be accepting any

22   hard copies of proposals. In order to

23   respond to this RFP, you must be

24   pre-qualified in the HHS Accelerator

25   system. Again, please note the proposal

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 1                    Proceedings
 2      due date is March 15th, 2017 at 2:00 p.m.
 3      in HHS Accelerator.  Proposals submitted
 4      after this date will not be accepted.
 5      Notification of the award selections will
 6      be done through the HHS Accelerator system.
 7              The anticipated contract term will
 8      be July 1st, 2017 to June 30th, 2020 with
 9      options to renew for up to additional three
10      years.  If you still have questions after
11      this pre-proposal conference, you may
12      e-mail us at
13      dycd@rfpquestions@dycd.nyc.gov.  Please
14      note, in order to ensure timely responses,
15      all questions must be received no later
16      than March 6th, 2017.
17              All right.  So I want to go over
18      with you an important part of your -- of
19      the RFP which is the M/WBE utilization
20      plan.  So I saw some hands go up from
21      yesterday, we have some M/WBEs here, and I
22      just want to get a sense of who's here
23      because I'll be going over some things,
24      depending on where you fall.  So right here
25      we have the New York City M/WBE -- and by
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1	Proceedings
2	the way, who is our M/WBEs? If you could
3	just raise --
4	(Hands are raised.)
5	MR. BUNCH: Okay. So we got quite a
6	few. Okay. Great. All right.
7	So I'm going to go to a slide just
8	for you. So there's a Schedule B in the
9	RFP, Part II. This is referring to the
10	participation goal which counts towards the
11	RFP and is the M/WBE participation plan.
12	So for those that raised your hands, the
13	M/WBEs, you have the partial waiver. If
14	you decide to do a partial waiver, approval
15	must be obtained prior to proposal
16	submission. You have to submit Part III of
17	Schedule B to DYCD for approval no later
18	than March 8th, 2017 at the e-mail address
19	you see listed there. You also have to
20	submit Part II along about your approved
21	waiver form, Part III -- also known as Part
22	III, excuse me, must be submitted with your
23	proposal in the HHS Accelerator system.
24	If you're not going to do a partial
25	waiver, you have the full waiver option

1   Proceedings

2   which is approval must be obtained prior to

3   the proposal submission. You have to

4   submit Part II of Schedule B to DYCD for

5   approval no later than March 8th, 2017 to

6   the e-mail address listed there, with your

7   approved waiver form, also known as Part

8   III, must be submitted with your proposal

9   to the HHS Accelerator system.

10   So if you're an M/WBE, you have

11   three ways to meet the M/WBE utilization

12   plan. It could be, again, participation

13   towards the RFP goal, which is part of

14   Schedule B Part II, or you can do a partial

15   waiver, as I indicated, or you could do the

16   full waiver, but you have to do one of

17   those conditions there in order to meet the

18   M/WBE utilization goal.

19   For those that are for-profit but

20   not M/WBE, if you could just raise your

21   hands.

22   (Hands are raised.)

23   MR. BUNCH: So these are your

24   non-M/WBEs but you're a for-profit.

25   For-profit, but you're not M/WBE.

1   Proceedings

2   We got some fearful people. All

3   right.

4   So that's the second category,

5   for-profit non-M/WBE. So if you meet this

6   category, similar to the M/WBE plan but a

7   little different, you have three

8   conditions. One of the three conditions

9   you have to meet, again, the participation

10   goal which is your Schedule B Part II,

11   M/WBE participation plan, or you could do

12   the partial waiver which you fill out

13   Schedule B Part II, and you fill out Part

14   III, right, or you could do the full

15   waiver, Schedule B Part III, request for

16   waiver of M/WBE participation requirement.

17   All right. So those are our M/WBEs

18   and the for-profit non-M/WBEs.

19   Who's our non-profits?

20   (Hands are raised.)

21   MR. BUNCH: All right. Non-profits.

22   So for the non-profits, Schedule B

23   is not applicable to you. So all you have

24   do is upload your 501c3 at time of proposal

25   submission. All right. So again, based on

1	Proceedings
2	wherever you fall, these are the
3	requirements you'll have to meet.
4	All right. The computer has a mind
5	of its own.
6	Let's now turn this conference over
7	to our panel. I ask that you please hold
8	any questions until the end of the panel
9	presentation. I'd like to ask Natasha Mast
10	from HHS Accelerator. She'll be going over
11	the pre-qualifying proposal submission.
12	MS. MAST: Hi, everyone. I'm shy so
13	I'm hiding in the back today. Quick
14	question -- welcome. My name is Natasha
15	Mast. I work for the Mayor's Office of
16	Contract Services. HHS Accelerator, if
17	you've heard of us before, we just joined
18	the Mayor's Office of Contract Services in
19	the past year so just wanted to let you
20	know about that change.
21	Quick question, how many people here
22	have an Accelerator account?
23	(Hands are raised.)
24	MS. MAST: Awesome. How many people
25	are pre-qualified?

11

1   Proceedings

2   (Hands are raised.)

3   MS. MAST: And if you don't mind,

4   how many people are still working on their

5   pre-qualifications?

6   (Hands are raised.)

7   MS. MAST: That's okay. I'm going

8   to call Jenn. She's in the back. You may

9   already be speaking to her. We're

10   available at the end if you have any

11   questions about your actual application.

12   We do run, I just wanted to let you know,

13   we are running -- we do run webinars every

14   week on getting pre-qualified, we have

15   in-person trainings, and we have guides and

16   we have resources. My team also runs the

17   help desk so you can send us an e-mail

18   clarifying -- and ask us any clarifying

19   questions as you're trying to get

20   pre-qualified. So a lot of

21   times -- sometimes people look at our

22   pre-qualification and think we want it to

23   be more complicated than we want it to be,

24   so if something seems hard or off, just ask

25   the help desk and we'll clarify if you have

1   Proceedings

2   to do that before you spend a lot of time

3   on something.

4   For the folks that have gotten

5   pre-qualified, it was okay? Hopefully.

6   So I'm going to go through. You

7   need to have an account in Accelerator.

8   You need to be pre-qualified in Accelerator

9   to view the RFP, to review any addendums,

10   and to be able to propose to these

11   opportunities. So I'm saying that sort of

12   serious. This is a change. This is the

13   first time we're doing a professional

14   service RFP through our system, but we're

15   not new at this. This might be new to a

16   lot of you in the room. We have over $3.8

17   billion for health and human service RFPs

18   that are competed for in our system on an

19   annual basis.

20   So we have thousands of

21   organizations in the City that are

22   pre-qualified already. Your

23   pre-qualification lasts -- is good for

24   three years. Any time that an opportunity

25   comes up in the service areas that you're

1   Proceedings

2   pre-qualified in, you'll get e-mails. So

3   it's a really good spot for this

4   opportunity, and it's also a really good

5   spot to be in in general if you want to

6   continue to do business with the City.

7   All proposals are due at 2:00 p.m.

8   on the deadline -- on the due date

9   electronically. So make sure it says

10   submitted, that it's not in draft, and that

11   it's in submitted status. My team will

12   call you the day before as a reminder if

13   you're still in draft. So just make sure

14   it's in submitted. There's no way if you

15   don't click submit that these -- your

16   proposal will be reviewed. You have to

17   submit. That's the only way that DYCD is

18   able to view it.

19   If you submit it, you realize you've

20   made a mistake and you have to -- you've

21   uploaded a pizza menu, you are able to

22   retract this before the deadline. You can

23   take it back, put it back into edit mode,

24   make a quick correction and resubmit it,

25   but you have to resubmit it. If you

1	Proceedings
2	realize post 2:00 p.m. you want to do that,
3	it's not possible.
4	You'll notice I put our help desk
5	e-mail. We have an e-mail that we give
6	you. We try to be as responsive as
7	possible and reply within an hour during
8	business hours to any questions you may
9	have. If you have -- if you're
10	experiencing -- you have any kind of
11	questions, just let us know. You can
12	always ask for a call. We can pick up the
13	phone and call you back. We don't provide
14	a number but we'll call you.
15	And the one thing I'll note is we
16	can only answer questions about how to use
17	our system. We are not allowed to answer
18	any questions about the actual RFP. So if
19	you -- if it's -- if it's the day of and
20	you have a clarifying question that you
21	want to ask about this opportunity, my team
22	is not able to answer those because this is
23	DYCD's opportunity so they're the
24	ones -- the only ones allowed to speak to
25	what they're looking for, so I just wanted

1   Proceedings

2   to clarify that.

3   Okay. So what is the

4   pre-qualification? In the past, if you

5   ever submitted a proposal to DYCD or any

6   City agency, you would have been asked for

7   a lot of your foundational documents in

8   hard copy, maybe three to five copies,

9   depending on the agency. What we've done

10   to make everybody's life easier, welcome to

11   this process, is we've made the

12   pre-qualification -- we've created a

13   pre-qualification system where we ask you

14   for those documents upfront, but we only

15   ask you every three years as opposed to

16   every time you propose. And with the

17   exception for the non-profits in the room,

18   we do need to see your filings on an annual

19   basis that you're up-to-date with the

20   Charities Bureau. But everybody else, you

21   just need to get pre-qualified, and you

22   just need to choose one service, Capacity

23   Building. So if you've been pre-qualified

24   with Accelerator for years but maybe not

25   for that service, go and apply for that

1   Proceedings

2   service. We just added it for this

3   opportunity.

4   The other thing I want to state is

5   if you're applying for the services, just

6   to give you a little hint, and we do not

7   need to see the full depth of your

8   experience for Capacity Building. I'm just

9   putting it out there. We just need to see

10   a form of proof, either a contract that

11   you've held or any funding in the past five

12   years where you've provided that service; a

13   staff member's resume, make sure the resume

14   says your organization; or a capability

15   statement if you don't have many

16   experience. Capability statements are very

17   rare, so don't go back to your office and

18   ask every single staff member for their

19   resume. We only need one form of proof.

20   Okay. So that's an example.

21   So once you're ready to propose,

22   you're going to go -- you're pre-qualified,

23   it's the due date, do it the day before so

24   you're not stressed. Why not? Let's do it

25   in advance. You'll go to the road map,

1

2   you'll find the opportunity for Capacity

3   Building, you'll click add new proposal.

4   You'll answer all the questions that they

5   have. They're very simple. You can start

6   your proposal today. You don't need

7   to -- you can work on it, upload documents

8   as you're ready, you can go back to it.

9   You don't need to do it all in one sitting.

10   You upload your required documents, and

11   only when you've uploaded everything that's

12   required are you able to submit.

13   Do not submit before you read

14   the -- before any addendums are released.

15   You'll want to read all the questions from

16   today, all the responses, but, you know,

17   the day before or so forth, submit your

18   proposal. And only level 2 users, which

19   probably everybody in here are able to

20   submit. So if you -- if you have an

21   administrative assistant that you gave

22   limited access to in Accelerator, you have

23   the rights to control that access. They

24   would not be able to submit this proposal

25   on behalf of your organization. So just

1   Proceedings

2   make sure. If you are the only user in

3   Accelerator, you automatically have that

4   access but some of the large organizations

5   where there's hundreds of people using

6   Accelerator have created different

7   hierarchies for access. So I'm just

8   pointing out you have to be level 2.

9   You submit the proposal, and as I

10   mentioned, you can always retract it and

11   make any adjustments all the way up until

12   the 2:00 p.m. deadline. And we will call

13   you at Accelerator the day before if you're

14   in draft and say are you really proposing,

15   kind of get a sense if you're proposing.

16   We're tracking, we're sharing with DYCD if

17   you're proposing.

18   How many people in this room have

19   proposed before?

20   (Hands are raised.)

21   MS. MAST: I'm just curious. Okay.

22   That's great. Okay. So this is not new to

23   most of you. That's great.

24   And for the folks if this is new or

25   you're not pre-qualified, my team's job is

1   Proceedings

2   to get you through this process and to help

3   you, so Jenn and I are here until the end

4   and you can ask us any questions or

5   follow-up with our help desk, and it's

6   probably one of us answering your questions

7   on the other side. Thank you.

8   MS. JONES: So good afternoon,

9   everyone, and welcome. I'm really glad to

10   see so many of the individuals who

11   participated in yesterday's networking

12   session. I'm glad you took me up on my

13   offer and came down, and I hope you'll have

14   an opportunity to mingle with others at the

15   end to see who's in the room.

16   So, good afternoon. I am Meryl

17   Jones, Assistant Commissioner for Capacity

18   Building and Professional Development, and

19   on behalf of DYCD, I welcome you to this

20   Pre-Proposal Conference for Capacity

21   Building Services, Strengthening

22   Organizations.

23   So how do we define Capacity

24   Building? We defined it as any activity,

25   such as strategic planning, board

1   Proceedings

2   development, or improvements in program

3   practices or technology, that increases an

4   organization's program outcomes or

5   sustainability. Through its Capacity

6   Building Division, DYCD fosters continuous

7   improvement and programmatic learning at

8   professional development among its funded

9   non-profits to help them become more

10   effective service providers.

11   This particular RFP responds to the

12   unique organizational needs facing

13   DYCD-funded service providers as they

14   navigate complex funding, programmatic and

15   operational structures in a frequently

16   changing labor and demographic landscape.

17   So this is the mission, Capacity

18   Building, and I think what's most important

19   to point out is of course our mission is to

20   strengthen the capacity of our

21   organizations that we -- that are funded by

22   us, but most importantly we want to make

23   sure that these agencies are ready, willing

24   and able to benefit from our services.

25   Additionally, the goals of our

1   Proceedings

2   particular unit are also to increase

3   non-profit ability to achieve positive

4   outcomes for their participants, and to

5   really support the organizations funded by

6   us through continuous quality improvement.

7   Over the past decade, DYCD has invested in

8   capacity of non-profits as a strategy for

9   ensuring that youth and families receive

10   high-quality effective services.

11   So these are the different types of

12   capacity building that we support. These

13   are the various modalities which include

14   coaching, consulting, training,

15   conferences, publication. We've also

16   developed partnerships and some really

17   amazing university partners. So we have

18   FDC training, we oversee the cultivating

19   curiosity initiative, we've created a

20   number of college-based partnerships which

21   have supported staff at our funded agencies

22   in terms of achieving their degrees, and we

23   also work -- provide training to

24   various -- our colleagues here at DYCD and

25   our various program areas.

1   Proceedings

2   The Capacity Building Unit is

3   responsible for professional development,

4   and organizational development and

5   technical assistance, so our team currently

6   oversees a portfolio of approximately -- of

7   14 technical assistance providers

8   supporting 24 content areas and our budget

9   is approximately $6 million annually. We

10   also lead many special projects and pilots

11   in collaboration with our colleagues here

12   in the agency that are customized to the

13   needs of that particular portfolio, and we

14   are also mindful of and facilitate a number

15   of strategic partnerships that -- with

16   resource-rich organizations that can help

17   enhance programs. We've developed Citywide

18   advanced that engage CBOs with real

19   innovate programming and model exemplary

20   practices.

21   To support our Capacity Unit

22   strategies, we leverage the expertise of

23   technical assistance partners to offer

24   community-based organizations -- so we

25   leverage the expertise of our technical

1   Proceedings

2   assistance providers to offer

3   community-based organizations support from

4   leaders in the field. Hundreds of

5   organizations have benefited from a range

6   of services such as intensive

7   organizational development consulting,

8   focusing on organizational development,

9   board development, financial management,

10   financial planning, program design and

11   implementation, as well as performance

12   management. We've provided training on key

13   topics in youth and family services and

14   resources for staff on a range of topics

15   that support their program requirements.

16   On average, we training for -- we provide

17   training for over 5,000 individuals a year.

18   There are usually wait lists for our

19   trainings, and our technical assistance

20   providers facilitate anywhere from 15 to 20

21   professional development activities per

22   month.

23   Our current approach to capacity

24   building includes incorporating adult

25   learning principles, an increased focus on

1   Proceedings

2   multiple-level staff support. It is vital

3   that capacity building reflects an

4   understanding of the key role played by

5   staff at all organizational levels. We

6   partner with content specialists and field

7   experts. We promote quality by focusing on

8   more intensive pure-based learning

9   opportunities, and we integrate -- the

10   integration of coaching as well in terms of

11   our followup services. This is really key

12   because all the services that include

13   coaching emphasize the connection between

14   capacity building activity and program

15   practice. And we encourage strategic

16   partnerships among our providers,

17   especially in service and funded agencies

18   that may want to leverage their limited

19   resources.

20   Outcomes are also important to us,

21   and as such, we have implemented CV

22   Advance, and that's our online management

23   tool which enables analysis of critical

24   data to assess trends in our capacity

25   building services among our funded TA

25

1	Proceedings
2	providers. And by putting together
3	practitioners, researchers and other
4	experts to strengthen organizations and
5	programs, DYCD strengthens organizations by
6	investing in their planning, leadership
7	development and infrastructure. We enhance
8	program quality by building frontline and
9	supervisory staff knowledge and skills, and
10	we promote learning and continuous
11	improvement.
12	The investment in capacity building
13	has helped us amend DYCD standing, and as a
14	field leading government agency, that
15	creates exemplary program models and
16	resources, strengthens our organizations,
17	and strives to continuously improve
18	services for youth and families. By
19	building on these past successes, the
20	Capacity Building Division will continue to
21	provide programmatic technical assistance
22	services that focuses on issues of national
23	multi importance, strengthen services for
24	our participants, and increase positive
25	outcomes.

```
 1                     Proceedings
 2            So DYCD's Capacity Building Unit
 3       will continue to bolster community-based
 4       organizations in the field by offering
 5       organizational development technical
 6       assistance services, creating leadership
 7       development opportunities, preparing staff
 8       to be effective managers and supervisors,
 9       encouraging workers to pursue their
10       certifications and college degrees.  We
11       promote peer and action learning networks,
12       and develop partnerships and other
13       resources that support program equality.
14            Now I'm going to turn it over to
15       Miguel.  He's going to take you through the
16       RFP service options.
17            MR. BONILLA:  Thank you, Meryl.
18            Hello.  Good afternoon.  Do you guys
19       have your coffee?  You're ready for this?
20            My name is Miguel Bonilla.  I'm
21       going to take you through the four service
22       options.  So there's four separate
23       competitions, just to be clear.  It's one
24       RFP but you would have to apply separately
25       for each one.  So I'm going to take you
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1   Proceedings

2   through all the four service options.

3   So the first one is Board

4   Governance, the next one is Fiscal

5   Management, Fund Development and

6   Organization Development. Then I'm going

7   to also tell you what the amounts are for

8   each service option.

9   So under Board Governance, what

10   we're looking for is, if you work in the

11   field of board governance, you know that

12   it's critical to have strong board

13   governance in order to help an organization

14   pursue its mission and services. We know

15   that engaged boards are more likely to

16   evaluate organizational performance,

17   oversee finances and raise money. We're

18   looking for a consultant who has the

19   expertise and knowledge to help board

20   leadership understand its fiduciary

21   responsibility, expectations for the board,

22   and evaluate the executive director. So

23   that's what we're looking for in that

24   service option.

25   For Fiscal Management, we know that

1   Proceedings

2   strong fiscal management is needed to hire

3   staff appropriately, manage organizational

4   growth, and deliver high-quality services.

5   We're looking for a contractor that would

6   help non-profit leaders create

7   program-based budgeting, monitor and

8   understand finance functions, develop and

9   maintain appropriate fiscal controls, and

10   help boards understand their fiscal

11   position, among other things.

12   Under Fund Development, we realize

13   that it's important to have a plan to

14   create cash reserves. A non-profit should

15   have diversified funding streams and have

16   the skilled staff to be able to raise money

17   for your organization. A contractor would

18   help non-profit leaders plan for diverse

19   funding base, identify and recruit

20   appropriate development staff and engage

21   board in fundraising.

22   Under Organizational Development, we

23   know that it's critical for organizations

24   to have skills and practices that bring

25   together stakeholders to plan and execute

1   Proceedings

2   their work, promote healthy human resource

3   practices, and manage conflict well.

4   Contractor would help non-profit leaders

5   with strategic planning, establishing

6   internal monitoring systems, effective

7   management and supervision practices.

8   These are the service options and

9   amount per year and the total for three

10   years. As Keith mentioned, this is what we

11   would have for the next three years with an

12   option to renew after the -- for an

13   additional three years after that.

14   These are some resources

15   that -- some resources to -- if you want to

16   find out more about us. On our website,

17   there's an area where we've listed a lot of

18   documents that tell you more about

19   the -- our unit, the Capacity Building

20   Unit, and there's also a link to a social

21   media policy.

22   MR. BUNCH: Thank you to Miguel and

23   Meryl for going over some information

24   regarding Capacity Building, RFP content

25   areas.

1   Proceedings

2   I'd like to go over post-award

3   requirements. So we have general

4   information and regulatory requirements.

5   So I just want to go into responsibility

6   determinations, very important. Please be

7   advised that it's a requirement for all

8   contractors to be determined responsible in

9   the post-award phase, therefore, please

10   make sure your vendex filings are

11   up-to-date, your charities filings are

12   current, and ensure that any outstanding

13   liens or adverse information has been

14   resolved. Unresolved issues often cause

15   significant delays in the post-award

16   process. Also to mention the Notice for

17   Proposer Subcontractor Compliance, and the

18   HireNYC Rider.

19   I also want to go over the insurance

20   requirement. So the contractor must

21   demonstrate that necessary insurance

22   coverage -- the contractor must demonstrate

23   that necessary insurance coverage,

24   commercial general liability insurance of

25        $1 million per occurrence, and $2 million

1   Proceedings

2   aggregate; motor vehicle liability

3   insurance of $5 million, if applicable; and

4   workers' compensation insurance is in place

5   from the first day of the contract by

6   providing an original certificate of

7   insurance naming the City of New York,

8   together with its officials and employees,

9   as an additional insured. DYCD will not be

10   able to proceed with any processing of an

11   awarded contract until it has obtained

12   proof of the necessary insurance coverage.

13   All right. So I think this is your

14   favorite session of the day. So we have

15   the Q&A. At this time, we'll have the

16   session. Please note the session is only

17   for purposes regarding the RFP. Moreover,

18   this is your only opportunity to ask the

19   panel questions. Once the Q&A session

20   ends, the panel will not be able to take

21   any questions, therefore, if you want to

22   ask the panel any questions, this is your

23   opportunity to do so.

24   Once again, please make sure all

25   questions pertain to this RFP. Anyone who

1   Proceedings

2   wishes to ask a question or needs further

3   clarification, you're going to line up next

4   to me to my left in front of this

5   microphone. Please be sure to state your

6   name and the name of your agency, and

7   reference the page of the RFP that pertains

8   to your question.

9   Anyone have questions regarding the

10   RFP?

11   MS. LEVINE: I'm from Cause

12   Effective, Judy Levine. Question about

13   staffing, RFP -- question 16 in the RFP.

14   You want the roles, qualifications,

15   responsibilities and job expectations for

16   staff positions. Do you want frontline,

17   consulting staff and administrative, and

18   program board initiative staff or just the

19   frontline service provider staff? It's

20   page 4. It's part of Attachment B.

21   MS. JONES: So for us, it is related

22   to the staff that would be responsible for

23   the administration of the particular

24   contract.

25   MS. LEVINE: So administration as

1	Proceedings
2	well as the -- okay.
3	I have a couple of other questions
4	but if other people want to go ahead of me
5	they could.
6	Okay. The one right before that, it
7	says assume a single DYCD-funded
8	organization, I guess it's service option
9	4-B. I'm assuming when you said 2,400
10	characters, it's not 30 words but it's 300
11	words?
12	MR. BONILLA: That's correct.
13	MS. LEVINE: Okay. Just making sure
14	you don't want seven questions in 30 words.
15	Moving to the next page, Evaluation
16	of Capacity Building. When you're
17	referring to question 21, if your capacity
18	building service are subject to an external
19	assessment, is that only a DYCD assessment
20	or if we have done -- had an external
21	evaluator evaluate our programs, can we
22	submit that?
23	MS. JONES: Yes. You just may not
24	have had any DYCD contracts so...
25	MS. LEVINE: Right. We haven't.

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1	Proceedings
2	Okay.
3	And last thing, you talk about
4	control of the training facility and what
5	you mean by that, and a training facility
6	of 50 or a training facility in which we do
7	consulting in groups of 20? What do you
8	mean by that?
9	MR. BONILLA: Control of your
10	facility so --
11	MS. JONES: I'm sorry. Could you
12	repeat the question? You said control in
13	terms of -- space in terms of 20 or 50?
14	MS. LEVINE: Yeah. I mean, we have
15	coaching space in space for 20 training at
16	our site. If you want us to do a seminar
17	for 100, we're going to have to look
18	outside, and if so, should we indicate how
19	we would do so if you would want so?
20	MR. BONILLA: It's what you would
21	plan to do so -- but you should have a
22	lease. So I don't think the number matters
23	as much as you having control over it and
24	being able to demonstrate proof that you
25	have control over your space. So whether

1	Proceedings
2	it's a lease, whether it's some kind of
3	written agreement, you have to be able to
4	demonstrate that you have control over your
5	facility. So the number at this point
6	doesn't matter because we wouldn't -- you
7	know, if you got the contract, we would
8	negotiate that later.
9	MS. LEVINE: Okay. Those are my
10	questions.
11	MR. SHAH: Sanjay Shah, Paragon
12	Management Group. My question is sort of
13	general about RFP. I understand you're
14	going to select four vendors out of this.
15	And the question I have is four vendors, is
16	it going to be one vendor in each area, or
17	how is it?
18	MS. JONES: We anticipate one vendor
19	per competition, one vendor per competition
20	area.
21	MR. SHAH: So one for fiscal and one
22	for each service?
23	MS. JONES: Yes.
24	MR. SHAH: Okay. Thank you.
25	MS. KINCH: Good afternoon. I'm

1   Proceedings

2   Cheryl Kinch from Kinch Law Group. I have

3   a question regarding mechanism. Do you

4   have a mechanism whereby I can access a

5   list of other perspective responders that

6   may be interested in teaming?

7   MS. JONES: Natasha, is that

8   available through Accelerator?

9   MS. MAST: I'm coming. Sorry.

10   Not -- I'm looking to see if Dana is

11   here. So how to match make between -- we

12   do have a -- if you are pre-qualified, and

13   even if you're not, if you have an account

14   in Accelerator, you can go to the third tab

15   for this opportunity and you can see who's

16   pre-qualified in the whole City for this

17   opportunity. So you can see everybody

18   who's pre-qualified for Capacity Building,

19   which is actually a reasonable number and

20   we provide the phone numbers for every one

21   of those organizations.

22   But do you know, if they're

23   interested, is it on the sign-in sheet

24   or --

25   MS. CANTELMI: So, Dana Cantelmi

1	Proceedings
2	from DYCD. We will also be posting the
3	attendance roster on our website along with
4	the transcript, so you will get that
5	information. It probably will not be up
6	until probably a week from now, but it will
7	be on our website.
8	MS. MAST: Do we want to -- would
9	you want to -- is there anybody interested
10	here? Like could we just have hands or do
11	we not want to do that?
12	MS. JONES: Well, I had asked Keith
13	and he said at the end when we've
14	officially closed the pre-proposal
15	conference, we would encourage each person
16	who wants to stand up, introduce themselves
17	and the contact area that they are
18	interested in so that folks can know who's
19	in the room at the moment and maybe some
20	matchmaking can happen after, but it has to
21	happen after we officially close the Q&A.
22	MR. SHAH: But you are going to
23	share the list of attendees today, right?
24	Because that would be very helpful.
25	MS. JONES: Yes. It says it right

1	Proceedings
2	there.
3	MS. MAST: Yeah, it's going to be
4	shared, but we also need to remember,
5	Capacity Building was just added to HHS
6	Accelerator in the past month, so I would
7	say the majority of folks that are
8	pre-qualified for that service are all
9	sitting here. So I think that that would
10	definitely be a great resource that you can
11	go to immediately after today, go into the
12	system and we provide the contact
13	information for those organizations so you
14	all have access to each other's because I
15	don't think you would have gotten yourself
16	pre-qualified if you weren't interested in
17	this.
18	UNIDENTIFIED SPEAKER: Excuse me.
19	What if you're not pre-qualified?
20	MS. MAST: Not everybody's
21	pre-qualified, I get that, but it's just a
22	starting point for the folks that have
23	gotten pre-qualified. And I should
24	mention, about a fourth of the room
25	mentioned that they're not pre-qualified

1   Proceedings

2   yet. Let's say you get pre-qualified in

3   two days, your name's on that list in two

4   days. So that's a living, breathing list

5   in Accelerator for who's pre-qualified for

6   Capacity Building.

7   MS. JONES: And in addition, as you

8   see, the attendance rosters will be on the

9   website for viewing. So Dana says that

10   goes up in a week, you compare the

11   attendance roster versus who's

12   pre-qualified so you'll know who is in the

13   room today.

14   MS. PUGLISI: So I actually have a

15   followup question on what you --

16   MR. BUNCH: If you could just come

17   up to the mic so we can get that on record.

18   MS. PUGLISI: Sure. So the --

19   MR. BUNCH: Name and organization.

20   MS. PUGLISI: Oh, I'm sorry. Maria

21   Puglisi, Right Tree Consulting, and I'm a

22   WBE and I am pre-qualified, which is great,

23   in Accelerator. So my question is, is when

24   you go to Accelerator and look at firms, I

25   don't recall if you could tell if someone

40

1	Proceedings
2	is an M/WBE or not.
3	MS. MAST: I don't think you can
4	tell if they're an M/WBE but you can tell
5	if they are for-profit or not-for-profit,
6	but you cannot tell if they're an M/WBE as
7	of -- in Accelerator. But we do share
8	their corporate status, which is an
9	indicator.
10	MR. BUNCH: Any other questions?
11	MS. ZHU: Good afternoon. Thank you
12	for your presentations. So my question is
13	about the four vendors that you're going to
14	select. Are those vendors -- will those
15	vendors who have previous experience of
16	working with other vendors get higher
17	scores on their RFPs? Like do you look for
18	their previous history, you know, their
19	relationship of working with each before
20	before you select those four vendors?
21	MS. BONILLA: While Bob is looking
22	for that, we should mention there's a state
23	directory of certified M/WBE vendors. If
24	you're looking for vendors, that's another
25	place to look. I don't know if the City

1   Proceedings

2   has a directory as well but there is a

3   State. If you Google New York State M/WBE

4   directory, you'll find the site.

5   MS. CANTELMI: So it is an open

6   competition. The structured proposal form

7   does ask specific questions on your

8   experience, so obviously the way that you

9   demonstrate your experience on the

10   structured proposal form will ultimately

11   determine how many points an evaluator will

12   give you. So it really is up to the way

13   you're writing our proposal, so that way

14   the evaluator who's actually reading it can

15   understand and know what capabilities your

16   organization has to run any of those

17   competitions that you're applying for, but

18   it is an open competition so anyone can

19   apply and they will get the points that the

20   evaluators feel appropriate as however they

21   actually filled out the structured proposal

22   form.

23   MS. ZHU: Yeah. I was just curious

24   like just in case there's some ties and

25   will you select the four vendors who have

1   Proceedings

2   worked before than those who haven't had

3   experience?

4   MS. CANTELMI: So there's a basis

5   for award in the actual RFP. We do

6   typically go with whoever is the highest

7   score, however, if there is a tie, there

8   will be additional steps that would have to

9   be taken, but this at point in time we

10   don't know who's competing or what the

11   scores and things like that will be, but

12   there is a basis of award that does outline

13   the steps that would be taken for this

14   selection.

15   MS. ZHU: Thank you.

16   MS. GOODRIDGE: Thank you. Sandra

17   Goodridge, Social Strategies Group. Thank

18   you for your presentations. I have a

19   question. My company is an M/WBE. Can an

20   M/WBE bid twice, and this is what I mean by

21   that, can an M/WBE bid in a category and

22   then also team with another business to

23   help them or non-profit to help them meet

24   their M/WBE goals? Is that permissible?

25   MS. BONILLA: Yes, that's -- you can

1   Proceedings

2   submit several proposals. That's correct,

3   right, Dana?

4   MS. CANTELMI: Yeah. So you can

5   submit a proposal, if you feel that you're

6   able to do the work yourself, you can

7   definitely submit a proposal. We are not

8   prohibiting anyone from building

9   subcontractor relationships and helping

10   other organizations out, so that's totally

11   up to you. There's no limit.

12   MS. GOODRIDGE: Okay. Thank you.

13   MS. SEN: Hello. I'm Suhrita Sen

14   from Infrastructure Advisors. My question

15   is for the three options you explained for

16   the M/WBEs, can you explain in what

17   circumstances should we choose a partial

18   waiver versus a full waiver versus going

19   for the full? I wasn't clear on that.

20   MR. BUNCH: Right. So let's say --

21   MS. CANTELMI: So for the M/WBE

22   waiver, just to clarify a point, if you are

23   a certified M/WBE, your participation in

24   the program will count towards that goal,

25   so you're going to be filling out Part II

1   Proceedings

2   and showing that your participation in that

3   program will meet that goal. If you are a

4   for-profit that is not a certified M/WBE,

5   then you would be filling out Part II and

6   it's really up to you because if you are

7   saying that you're going to meet 15 percent

8   of that goal, and what that means is that

9   you're going to be subcontracting out 15

10   percent of the work with a certified M/WBE,

11   then it's really up to you. You would have

12   to figure out whether it's a full waiver or

13   a partial waiver. So say, for example, you

14   know that you have the capability to do the

15   work completely yourself, you're not going

16   to subcontract any of the work, you will

17   then be seeking a full waiver because you

18   will not be able to meet that 15 percent

19   participation goal.

20   So again, if you're able to do the

21   work yourself and you're not going to seek

22   any subcontracting if you are awarded the

23   contract during the term of the contract,

24   you will be seeking a full waiver if you

25   are a for-profit organization. If you are

45

1   Proceedings

2   a for-profit who says I want to meet 5

3   percent of the goal, then you would be

4   seeking a partial waiver. And again, all

5   waivers have to be submitted to DYCD and

6   approved before the due date of the RFP and

7   it has to be submitted with the proposal in

8   Accelerator.

9   If you are a non-profit, then you're

10   exempt from the M/WBE participation but you

11   would have to upload your 501c3 so that we

12   will know when we're doing our responses to

13   check that the Schedule B did not apply.

14   So it's really up to organizations

15   to figure out whether or not they can do

16   this work completely themselves. And

17   again, this is for the for-profits that

18   aren't certified under M/WBEs, can you do

19   the work completely yourself and you're not

20   seeking any subcontracting. But again, we

21   do have and encourage a 15 percent

22   participation goal for this RFP.

23   UNIDENTIFIED SPEAKER: So just to

24   summarize then, for M/WBEs, they

25   automatically meet the goal so there is no

1	Proceedings
2	three options, there's only one option.
3	MS. CANTELMI: Right. So for
4	M/WBEs, you're meeting that participation
5	goal. You're not going to be seeking a
6	waiver because you will be filling out that
7	Part II and you're still required to upload
8	a Part II with your proposal submission but
9	you're not seeking an actual waiver.
10	If you can just come up because
11	we're transcribing this pre-proposal
12	conference and we just want to make sure
13	that we're getting everyone's name and
14	organizations on the transcript.
15	UNIDENTIFIED SPEAKER: I have a
16	question to followup. You said you
17	encourage M/WBE participation. By
18	definition, if you're seeking a waiver,
19	you're basically saying that you
20	cannot -- you're not using or cannot --
21	MS. CANTELMI: We're leaving it up
22	to the organizations. Again, we're looking
23	for someone that can provide the services,
24	that have the capacity to provide the
25	services. We just want to make sure that

1   Proceedings

2   we're getting someone that can meet the

3   goals.

4   UNIDENTIFIED SPEAKER: Understood,

5   but from a compliance perspective, how much

6   effort is made to not only encourage, but

7   to say to responsive organizations here,

8   you're looking for a waiver, but here is a

9   list of M/WBEs?

10   MS. CANTELMI: So I don't know how

11   many folks are looking for waivers and I

12   don't know how many folks that are

13   certified M/WBEs that are going to be

14   applying for this a hundred percent, so

15   it's really hard for me to --

16   UNIDENTIFIED SPEAKER: Understood,

17   but my question is going forward, if you

18   do, let's say half of the applicants come

19   to you and say we're seeking waivers, I'm

20   trying to understand how much effort is put

21   into saying to them --

22   MS. CANTELMI: So organizations

23   that --

24   UNIDENTIFIED SPEAKER: -- here's a

25   list, you don't need a waiver because

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 1                         Proceedings
 2          here's as list of qualified M/WBEs that can
 3          provide this service.
 4                  MS. CANTELMI:  So again, it goes
 5          back to whether or not the provider that's
 6          proposing can provide the service.  So they
 7          would actually have to fill out all of Part
 8          III and give references.  Like it's not
 9          just filling out a form.  Like they have to
10          go through a review process, we're checking
11          references, we're following up with MOCS,
12          so it is a process that has to take place.
13                  So again, I mean, if an M/WBE wants
14          to apply to the RFP, then definitely -- you
15          know, and again, I don't know who's going
16          to be submitting waivers and if they do
17          submit a waiver, we will be following
18          the --
19                  UNIDENTIFIED SPEAKER:  I'm going to
20          try one more time.
21                  MS. CANTELMI:  So maybe Bob will --
22                  MR. FRENZEL-BERRA:  What I'm hearing
23          is all proposers can have the option to
24          provide all the services themselves or to
25          subcontract out part of their services and
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1   Proceedings

2   indicate that in the proposal. So if an

3   organization plans to do all the work

4   itself then -- and not subcontract, then

5   they can apply for a waiver on that basis.

6   If they subcontract, then they're, for

7   certain applicants, for-profits, they then

8   have to consider the 15 percent.

9   UNIDENTIFIED SPEAKER: Okay. My

10   comment -- I have a further comment. As an

11   attorney who has extensive compliance

12   background, my comment is how much effort

13   is going to be made to adhere to the

14   compliance for M/WBE goals because if there

15   isn't sufficient effort in seeing that

16   there is adherence to those goals, then any

17   applicant can say oh, we're applying for a

18   waiver, then the M/WBE goal is meaningless.

19   So that's my point.

20   UNIDENTIFIED SPEAKER: I think if I

21   were to add a phrase is, is there an

22   evaluation criteria for compliance with the

23   M/WBE goal? That is the bottom line. How

24   many points are awarded?

25   MS. CANTELMI: So there is no points

1   Proceedings

2   awarded specifically to --

3   UNIDENTIFIED SPEAKER: So then that

4   means there is no -- that this is just

5   not --

6   MS. CANTELMI: So again, if there's

7   comments or anyone that wants to come up,

8   you do have to come up because they are

9   transcribing.

10   MS. BINUA: Good afternoon,

11   everyone. I'm sorry for my voice. I am

12   from Padilla & Company. I just want to

13   share with you. We have been doing audits

14   for Local Law 1, okay, for it to require

15   all government contracts to have the

16   participation goal of the M/WBE. So I

17   think what you need to have a waiver if you

18   are already an M/WBE, then that's the time

19   that you can request for a waiver because

20   you can do the job, but if you are not an

21   M/WBE, you have to satisfy the

22   participation goal. Okay. That is based

23   on our audit of the Local Law 1.

24   MS. CANTELMI: So again, so the

25   instructions for the M/WBE requirement and

1   Proceedings

2   the goal is in the RFP. It's outlined.

3   You know, we can take additional questions

4   after, but this is -- there is a 15 percent

5   goal on the RFP. We encourage and would

6   love to have M/WBEs in our program and if

7   M/WBEs can do the full program without

8   subcontracting a hundred percent, that's

9   great. We're not saying that folks should

10   apply for a waiver. We're holding -- we're

11   allowing folks to network at the end of

12   this to see if it could, you know, work,

13   but again, if they are applying for a

14   waiver, we will follow the steps as

15   outlined in the RFP.

16   If you could come up and state your

17   name.

18   MR. SHAH: Sanjay Shah, Paragon

19   Management Group. I think what others have

20   been saying and I will try to rephrase it

21   in a different way, there has to be points

22   assigned to the meeting of the M/WBE goal.

23   We do work with the federal agencies and

24   when they do set asides, there are projects

25   sometimes, they are going to both small

1   Proceedings

2   firms and large firms but they set aside

3   like ten points for those who are, you

4   know. So unless you assign points that are

5   in the determination, I think all these

6   goals, and I understand what you're talking

7   about, has no practical, you know, impact,

8   number one.

9   Number two, I'm actually in the

10   process of pre-qualification and we should

11   be submitting in a day or two, but I

12   already saw a number of firms so --

13   MS. MAST: What?

14   MR. SHAH: A number of firms that

15   are non-profits that are pre-qualified in

16   this thing. If any of them are M/WBE, I

17   think the onerous should be on those

18   seeking waiver, why they have not used

19   pre-qualified firms, meaning that there

20   should be a higher bar for them --

21   MS. CANTELMI: Non-profits can't be

22   certified M/WBEs though.

23   MR. SHAH: No, not non-profit. I'm

24   talking about for-profit.

25   So if they are seeking waiver, then

1   Proceedings

2   there should be a higher bar for them to

3   explain why they want a waiver when they

4   are pre-qualified M/WBE.

5   MS. CANTELMI: So point definitely

6   taken, but for this RFP, as I mentioned, we

7   did not put any point preference, but

8   definitely your point taken.

9   MR. SHAH: But it is not too late to

10   do that, that's what we are saying. It's

11   not too late to do that. All this talk

12   about promoting and M/WBE firms, ultimately

13   it comes down to whether or not it is, you

14   know, in the points, it is in the scoring,

15   otherwise it's talk. I'm sorry. I am

16   saying it bluntly but that's what it is.

17   UNIDENTIFIED SPEAKER: And I'm just

18   going to add, I was in the City

19   Comptroller's meeting for M/WBEs and -- I'm

20   sorry. New York City, the last time was

21   audited had a four percent number for M/WBE

22   compliance and it has gone down to two

23   percent, so just to share that when you

24   take out RFPs, just to keep that in mind.

25   It's quite pathetic to start with.

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1	Proceedings
2	MR. BUNCH: All right. If you have
3	a question, please feel free to come to the
4	microphone. Only if you have a question,
5	please.
6	Can you hear me? So I'll speak
7	louder.
8	So if you have a question regarding
9	the RFP, you're free to come up.
10	MS. RICH: Hi. Susan Rich with
11	LIFMS. We're a WBE certified New York City
12	and New York State CPA practice. We
13	currently consult with several DYCD CBOs.
14	My first question is, is that a good thing
15	or a bad thing?
16	MS. JONES: If they're happy with
17	your work, I'm assuming it is.
18	MS. RICH: Is it a conflict of
19	interest if we're consulting with some DYCD
20	CBOs?
21	MS. JONES: No.
22	MS. RICH: Okay. And just -- my
23	question is, if you're truly committed to
24	the clients of these CBOs, the DYCDs, which
25	are minorities and underserved populations,

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2   why in the world doesn't DYCD put its money

3   where its mouth is and implement a no

4   waiver policy on M/WBE just like New York

5   State OCFS has done, like many other

6   agencies? You're progressive and you're

7   making so much progress. I would really

8   take this back to your leadership and tell

9   them the feedback you got here from

10   everybody, that we think it's somewhat

11   hypocritical not to provide services to

12   minorities, and then when they own firms

13   like many of these people here and they're

14   trying to build business, that you're not

15   supporting them.

16   MS. CANTELMI: Again, so I hear

17   everyone and note definitely taken. The

18   Schedule B and the waiver forms are not

19   developed by DYCD. This is an ongoing

20   effort for this administration and we will

21   bring that back, but for purposes of this

22   RFP, this is what has been set but

23   definitely we will take it back. We hear

24   you all.

25   MS. RICH: The RFP can be changed

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2   during the Q&A process.

3   MS. CANTELMI: If we change anything

4   in the RFP, an addendum will be released

5   but as of right now, that's what is stated.

6   MS. ZHU: Hi. Cheng Zhu with Humor

7   Leadership Consulting, specializing in

8   providing leadership and organizational

9   development and training services. So can

10   a vendor be a prime and a sub for proposals

11   at the same time, like a prime for one area

12   and then sub for another?

13   MS. JONES: Yes. Someone else asked

14   that question.

15   MS. ZHU: Oh, okay. Great. Thank

16   you.

17   MS. DAVIDOWITZ: Hello. Merna

18   Davidowitz, JCCGCI. I have a question.

19   There are four competitions and you're

20   choosing four awards. Are you committed

21   that each competition will have a different

22   awardee, or as I noticed in other

23   competitions, sometimes the same

24   organization is getting two or three?

25   MS. CANTELMI: So again, we don't

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2	know who is applying. We do have a base
3	for award, the right to see if there is any
4	concerns about demonstrating capacity, but
5	we are not at this time stating whether or
6	not one vendor will be awarded multiple
7	competitions or one competition each. It
8	all depends on who's applying and whose
9	scores that are being received.
10	Anyone else?
11	(No response.)
12	MR. BUNCH: Once, twice, three
13	times.
14	(No response.)
15	MR. BUNCH: All right. If there's
16	no questions, please be on the lookout for
17	any addendums that may be released in HHS
18	Accelerator. Also, please remember the due
19	date for proposal submission is
20	October 6th, 2017 -- excuse me. Please
21	note the proposal due date is
22	March 15th, 2017. Again, the proposal due
23	date is March 15th, 2017 at 2:00 p.m. in
24	the HHS Accelerator system. And again,
25	please be on the lookout for any addendums.

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2   I want to thank everyone for

3   attending, and this concludes our

4   pre-proposal conference.

5   (Time noted: 3:10 p.m.)

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2   C E R T I F I C A T E

3

4   STATE OF NEW YORK   )
) ss.:
5   COUNTY OF RICHMOND) ss:

6

7   I, JENNIFER CASSELLA, a Notary Public

8   within and for the State of New York, do hereby

9   certify:

10   I reported the proceedings in the

11   within-entitled matter, and that the within

12   transcript is a true record of such proceedings

13   to the best of my ability.

14   I further certify that I am not related

15   to any of the parties to this action by blood

16   or marriage; and that I am in no way interested

17   in the outcome of this matter.

18   IN WITNESS WHEREOF, I have hereunto set

19   my hand this 19th day of February, 2017.

20

21   _____

22   JENNIFER CASSELLA

23

24

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