

**Request for Resume (RFR) for Project Manager (Senior)**  
**CATS+ Master Contract**  
**All Master Contract Provisions Apply**

Section 1 – General Information			
<b>RFR Number:</b> (Reference BPO Number)	WCCB6400022		
<b>Functional Area</b> (Enter One Only)	Functional Area 10 - IT Management Consulting Services		
Labor Category/s			
<i>Enter the labor category/s to be provided:</i>			
<b>1. Project Manager</b>			
<b>Anticipated Start Date</b>	July 2016		
<b>Duration of Assignment</b>	One year base period; Four one-year renewal options		
<b>Designated Small Business Reserve?(SBR):</b> (Enter "Yes" or "No")	No		
<b>MBE Goal, if applicable</b>			0%
<b>Issue Date:</b> mm/dd/yyyy	May 12, 2016	<b>Due Date:</b> mm/dd/yyyy	June 2, 2016
		<b>Time (EST):</b> 00:00 am/pm	1:00 PM
<b>Place of Performance:</b>	Workers' Compensation Commission 10 E. Baltimore St., Baltimore, MD 21202		
<b>Special Instructions:</b> (e.g. interview information, attachments, etc.)	<ol style="list-style-type: none"> <li>1. Interviews will be performed by phone and/or internet (e.g., Skype, GotoMeeting, WebEx) <b>or</b> in person for all Offerors meeting minimum qualifications. All candidates shall be interviewed in substantially the same manner. The Procurement Officer shall, for each round of interviews, determine whether phone/internet or in-person interviews will be utilized.</li> <li>2. The State reserves the right to conduct in person interviews during the first and/or second round of interviews, and they will be held at 10 East Baltimore Street, Baltimore, MD 21202</li> <li>3. Interviews will be conducted by a panel using a standardized set of interview questions for all candidates.</li> <li>4. In the event that more than five (5) qualified proposals are received, the TO Procurement Officer may elect to follow a down-select process as more fully described below. <ol style="list-style-type: none"> <li>a. The TO Procurement Officer will notify the Offeror at time of scheduling initial interviews whether subsequent rounds of interviews are required. When used, the down select procedures to be followed by the TO Procurement Officer are as follows: <ol style="list-style-type: none"> <li>i. An initial interview will be performed for all proposals</li> </ol> </li> </ol> </li> </ol>		

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	<p>meeting minimum requirements.</p> <ul style="list-style-type: none"> <li>ii. A technical ranking will be performed for all proposals based on the initial interview. Proposals will be ranked from highest to lowest for technical merit based on the quality of the proposals submitted and interview results.</li> <li>iii. The top five (5) proposals identified by the technical ranking will be notified of additional interviews if applicable.</li> </ul> <p>5. The TO Contractor shall be required to comply with all applicable laws, regulations, policies, standards, and guidelines affecting information technology projects, which may be created or changed periodically.</p> <p>6. The TO Contractor shall adhere to and remain abreast of current, new, and revised laws, regulations, policies, standards, and guidelines affecting project execution. The following policies, guidelines and methodologies can be found at <a href="http://doit.maryland.gov/policies/Pages/ContractPolicies.aspx">http://doit.maryland.gov/policies/Pages/ContractPolicies.aspx</a> under "Policies and Guidance." These may include, but are not limited to: The State's System Development Life Cycle (SDLC) methodology; The State Information Technology Security Policy and Standards.</p> <p>7. The TO Contractor shall follow the project management methodologies that are consistent with the Project Management Institute's Project Management Body of Knowledge Guide. TO Contractor's staff and sub-Contractors are to follow a consistent methodology for all TO activities.</p>
<p><b>Security Requirements (if applicable):</b></p>	<ul style="list-style-type: none"> <li>1. When visiting State facilities, the selected personnel shall adhere to all State security requirements. This includes presenting photo ID when inside State facilities and presenting ID upon request at any time. The selected personnel shall:</li> <li>2. Abide by the State's Security policies and procedures in force at each site.</li> <li>3. Comply with the requirements of the State of Maryland Department of Information Technology Security (DoIT) and WCC Security Policies and Standards, including cooperation and coordination with State and federal auditors, and other compliance officers. State Information Technology Security Policy and Standards policies are available here: <a href="http://doit.maryland.gov/support/pages/securitypolicies.aspx">http://doit.maryland.gov/support/pages/securitypolicies.aspx</a>, and include topics such as:             <ul style="list-style-type: none"> <li>A. <a href="#">Information Security Policy v3.1</a></li> <li>B. <a href="#">Mobile Device Security Policy</a></li> <li>C. <a href="#">IT Security Plan (ITSP)</a></li> <li>D. <a href="#">Automated E-Mail Forwarding Policy</a></li> <li>E. <a href="#">Standards for Categorizing, Certifying, and Accrediting an Information Systems</a></li> </ul> </li> <li>4. Agree to enter into a connectivity agreement with WCC. The agreement shall include, but not be limited to, the following:</li> <li>5. Refraining from connecting any non-State owned or unapproved computers to any State network without prior permission and assurances that the State security standards are met.</li> <li>6. Once established, not modifying security provisions for firewalls, client, and server computers without written State approval.</li> <li>7. Maintaining current updated virus software and virus definition files that are enabled to perform real time scans on all supplied hardware</li> </ul>

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	<ol style="list-style-type: none"> <li>8. Refrain from installing or utilizing remote control or file sharing software unless explicitly approved by the State in writing.</li> <li>9. Signing any documents that are reasonably necessary to keep the Contractor in compliance with the State IT Security Policies</li> <li>10. Failure to comply with State &amp; WCC security requirements on the part of the selected personnel will be regarded as a breach of the Contract and may be followed by termination for default.</li> </ol>
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<b>Invoicing Instructions</b>	
<ol style="list-style-type: none"> <li>1. After the end of each month, the Master Contractor shall submit timesheets (for hourly invoicing) and activity reports (for both hourly and annual invoicing) <u>electronically via email</u> to the Agency Task Order Manager (TO Manager) for review prior to submitting an invoice.</li> <li>2. The TO Manager shall review, sign, and return to the Master Contractor the timesheets (for hourly invoicing) or the activity reports (for annual invoicing).</li> <li>3. The Master Contractor shall send a copy of the signed timesheets or activity reports with an invoice <u>electronically via email</u> to the Agency TO Manager and Agency Procurement Officer (PO).</li> <li>4. The Master Contractor shall invoice as follows:             <ol style="list-style-type: none"> <li>a. Hourly Labor Rate: Task Orders awarded at the Hourly Labor Rate shall be invoiced monthly for actual hours x Labor Rate.</li> </ol> </li> </ol>	

<b>Special Invoicing Instructions:</b>	1. N/A
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**Section 2 – Agency Procurement Officer (PO) Information**

<b>Agency / Division Name:</b>	Workers’ Compensation Commission (WCC)		
<b>Agency PO Name:</b>	Christel Surdokas Procurement Officer	<b>Agency PO Phone Number:</b>	410 – 864 – 5256
<b>Agency PO Email Address:</b>	<a href="mailto:csurdokas@wcc.state.md.us">csurdokas@wcc.state.md.us</a>	<b>Agency PO Fax:</b>	410 – 864 – 5251
<b>Agency PO Mailing Address:</b>	Maryland Workers’ Compensation Commission, Attention: Contracts and Procurement, 10 East Baltimore Street, Baltimore MD, 21202		

**Section 3 – Scope of Work**

**Agency / Project Background**

In 2015 WCC commissioned a business process and technology assessment (BPTA) of its key business processes including those supporting Claim Processing and Adjudication, Insurance Compliance, and Reporting and Vocational Rehabilitation. Current state technologies in support of these business processes were also analyzed and documented. Results of the BPTA include short term and long term recommendations. The Short Term Recommendations cover the recommendations for the period of time from the end of the Business Process and Technology Assessment (BPTA) Project through the start of the Enterprise Modernization (EM) Project.

The purpose of short term recommendations is to address the risks, inefficiencies and deficiencies found in WCC processes and technologies during the BPTA, to facilitate WCC resources in best preparing for the EM Project so that outside resources are best leveraged, and to address internal WCC needs through WCC interim projects (Pre-EM Tasks and Projects) before starting the EM Project.

1. Pre-EM Tasks and Projects may include tasks and projects to:
  - A. Use ITIL as a Guide to Stand Up IT Processes and Governance
  - B. Identify & begin measurement of Baseline Measurements and Metrics that will measure EM project success

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- C. Develop requirements, standards, and deploy tools and training to Implement Consistent IT Source Code Control Usage
  - D. Identify requirements and support creation of pilot projects to facilitate an increase the use of technology by WCC employees that still use manual methods and use of Chat /Online Help by technical support staff members
  - E. Develop plan and priority to obtain and deploy secure wireless network connectivity in WCC’s Baltimore office, including a guess network
  - F. Requirements Definition and Refinement for EM project
    - i. Refinement of EM project requirements documented in BPTA project artifacts
    - ii. Determine and document changes needed to requirement for “wet” signatures on submitted forms
    - iii. Business analysis support for ongoing Forms Analysis and Design Project
    - iv. Evaluate scanning/document capture alternatives for OCR/ICR
    - v. Adoption of best practices for data integrity management specifications
  - G. Existing Systems Preparation for EM
  - H. Increase Security Readiness for EM
2. Long term recommendations for the EM solution shall address WCC’s goals to have a system that:
- A. Provides increased online functionality for WCC’s customers while still supporting customers who mail in documentation
  - B. Provides a solution that integrates Claims through Adjudication, Self-Insurance, Compliance, Reporting, Vocational Rehabilitation and Medical Services, which are WCC’s core business processes as well as all supporting business processes within the organization such as Fiscal Services, Personnel, and Information Technology
  - C. Improves functionality for WCC staff by providing the look and feel of one system
  - D. Streamlines the WCC work
  - E. Provides a transition plan for WCC IT support that starts in the system’s development phase so that the solution can be transitioned to WCC IT staff for maintenance and enhancement
  - F. Enables flexibility to continue to meet customer needs and to adhere to legislative changes
  - G. Provides the use of leading technology that can sustain WCC needs in the long term

<b>Job Description/s</b>	
<b>Labor Category/s (From Section 1 Above)</b>	<b>Duties / Responsibilities</b>
1. Project Manager (PM)	1. This position shall oversee and direct the Enterprise Modernization (EM) project team, which is comprised of contractors and State personnel. Responsibilities include overall project planning, governance and management for the EM project and select pre-EM tasks and projects; Duties shall focus on project planning, monitoring and control, and serving as primary liaison with Agency and Agency stakeholders.  2. The position shall ensure the appropriate application of the Project Management Institute’s (PMI) Project Management Body of Knowledge (PMBOK) and the State’s Systems Development Lifecycle (SDLC) in managing the project.  3. EM and Pre-EM duties include, but are not limited to: <ul style="list-style-type: none"> <li>A. Development of procurement documents, which may include Request for Information (RFI), task order request for proposals (TORFP), purchase order request for proposals (PORFP) and</li> </ul>

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Request for Proposals (RFP)

B. Provide counsel and expertise during the evaluation of bid proposals

4. Facilitate, support and liaison with vendors as well as WCC executive and project leadership, end users and stakeholders; perform in person interviews with business unit employees, technical staff, managers, and executives and review related business process current and ideal state documents, short term and long term recommendations and other artifacts from the BPTA project to gain a foundation for understanding organizations objectives, existing technologies, end-user needs and key business processes
5. Further refine existing from BPTA artifacts , identify missing, and document up to date current state and ideal state business processes and system requirements, incorporating the detailed list of components to be included in the EM solution and the proposed workflows within the new system; Prepare new or update existing from BPTA all related workflow diagrams, including swimlane diagrams and data flow diagrams of both current and ideal states
6. Provide written recommendations for developing product and service solicitations for the EM solution and related pre-EM tasks and projects including process management, forms standardization options, hardware and software requirements, equipment specifications, data storage and data security requirements, and future proofing (extensibility and flexibility options)
7. Prepare a written document describing the functional/business requirements, technical requirements, and non-functional/non-technical requirements for the recommended EM solution
8. Create and regularly update project schedules, staff task work plans, issues lists, risk lists and other documents.
9. Will direct Business Analyst in all areas of producing final technical and functional documentation, including documenting current state and ideal state processes, preparing workflow diagrams, and generating a functional/business requirements written document, documenting technical requirements, and documenting non-functional/nontechnical requirements for the EM solution
10. Review, manage and verify invoices and progress reports from vendors; Monitor, evaluate and report on project quality and vendor performance
11. Provide oversight over the development of detailed system requirements and testing plans to ensure user needs are satisfied; work cross functionally across WCC Divisions and Stakeholders to solve problems and issues
12. Direct development of a training and implementation plan for the EM solution and related pre-EM tasks and projects deployment
13. Provide continued support and expertise during the EM Solution deployment and initial maintenance period by tracking and facilitating the resolution of system issues

***See Attachment 3 for a detailed description of duties, responsibilities and deliverables.***

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<b>Minimum Qualifications</b>	
<p>For minimum qualifications, see the labor category description in the CATS+ RFP for the subject RFR labor category. In addition, qualified candidates <u>must</u> meet the minimum qualifications specified below. <b>Candidates that do not meet minimum qualifications will be deemed not reasonably susceptible for award and will not progress to evaluation.</b></p>	
<b>Labor Category/s (From Section 1 Above)</b>	<b>Minimum Qualifications</b>
Project Manager	<p><b>1. Education:</b></p> <p style="padding-left: 40px;">A. Bachelor's Degree from an accredited college or university in Engineering, Computer Science, Information Systems, Business, or other related discipline</p> <p><b>2. General Experience:</b></p> <p style="padding-left: 40px;">A. At least five (5) years of experience in project management.</p> <p style="padding-left: 40px;">B. PMI certification as a PMP or equivalent, as determined by the PO.</p> <p style="padding-left: 40px;">C. Within the past ten (10) years, has at least five (5) years of experience in managing IT related projects. (Each project shall have a dollar threshold of \$2.5 million or more to be considered as meeting this general experience minimum qualification.)</p> <p><b>3. Specialized Experience:</b></p> <p style="padding-left: 40px;">A. Must demonstrate a senior leadership role in at least three successful projects that were delivered on time and on budget</p> <p style="padding-left: 40px;">B. Within the past 10 years, at least three (3) years of project management experience in judicial information systems and case management systems analysis, business process reengineering, functional, technical and data requirements analysis and development, in performing English oral presentations, and in English project documentation preparation</p> <p style="padding-left: 40px;">C. At least two (2) years of experience drafting and managing Requests for Proposals for information technology projects</p> <p style="padding-left: 40px;">Note: Four additional years of experience in IT project management, systems analysis, business process reengineering, and/or requirements development may be substituted for the required education.</p>
<b>Preferred Qualifications</b>	
<p>The additional Experience/Knowledge/Skills listed below are preferred by the State.</p>	
Project Manager	<p><b>1. Education:</b></p> <p style="padding-left: 40px;">A. Master's degree</p> <p style="padding-left: 40px;">B. Within the past 10 years, completed at least 30 days of professional training in new technologies for developing enterprise information systems and/or new IT project management methodologies</p> <p><b>2. Specialized Experience:</b></p> <p style="padding-left: 40px;">A. At least 5 years of experience implementing enterprise application systems using Microsoft software development tools and related</p>

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products including Visual Studio, .NET Framework 4.0+, C#, ASP.NET, WebAPI, Entity Framework, Team Foundation, SQL Server 2008+, Project 2010+, and Visio 2010+

- B. Experience in managing projects within the Maryland Department of Information Technology (DoIT) Major Information Technology Development Project (MITDP) process

### Section 4 - Required Submissions

**NOTE:**

1. Master Contractors may propose only one candidate for each position requested.
2. Master Contractors electing not to propose in response to the RFR must submit a "Master Contractor Feedback Form" via the "Master Contractor Login" on the CATS+ web site.
3. Master Contractors proposing in response to the RFR must submit the documents below as separate files contained in two separate emails as follows:

**Email 1 of 2 as a password protected file with "Technical": Master Contractor Name, RFR number, & candidate name in the subject line**

1. Resume for each labor category described in the RFR (Attachment 1)
2. Three (3) current references that can be contacted for performance verification of the submitted candidate's work experience and skills. Telephone number and email address of reference is needed.
3. Conflict of Interest Affidavit (Attachment G in the CATS+ RFP)
4. Living Wage Affidavit (Attachment I in the CATS+ RFP)
5. Certification Regarding Investments in Iran (Attachment 4 of this RFR)
6. Any other required documentation to demonstrate meeting minimum qualifications.

**Email 2 of 2 as a password protected file with "Financial": Master Contractor Name, RFR number, & candidate name in the subject line. The password must be unique for each candidate e-mail.**

1. Price Proposal (Attachment 2)

The PO will contact Master Contractors to obtain the password to the financial proposal for those candidates that are deemed reasonably susceptible for award. Master Contractors who cannot provide a password that opens the file will be considered not susceptible for award. Subsequent submissions of financial content will not be allowed.

1. Copy of current PMI certificate, or equivalent (equivalency to be determined by the PO)
2. For education obtained outside of the U.S., you will be required to provide proof of the equivalent American education as determined by a foreign credential evaluation service. For a degree obtained outside of the United States, submit a detailed, course-by-course evaluation report from one of the U.S. equivalency evaluating members identified at <http://www.naces.org/members>
3. Copies of relevant professional certifications, course completion certificates or equivalent (equivalency to be determined by the PO) for training that satisfy Section 3 Scope of Work, Sub-section "Preferred Qualifications", item 1 A

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**Section 5 – Evaluation Criteria**

Candidates meeting the Minimum Qualifications listed in Section 3 above will be evaluated for overall best value, as follows:

1. Relevance of project management experience in judicial information systems and case management systems analysis, business process reengineering, functional, technical and data requirement analysis and development, (as described in Attachment 3).
2. Relevance of personnel’s IT project management experience to preferred qualifications, labor category requirements, and project management duties and responsibilities (as described in Attachment 3).
3. Ability to clearly communicate as demonstrated in the interview
4. Training and education as it relates to preferred qualifications, labor category requirements, and project management duties and responsibilities (as described in Attachment 3).
5. Professional References
6. Price

**Basis for Award Recommendation**

The Agency PO will recommend award to the Master Contractor whose proposal is determined to be the most advantageous to the State, considering price and the evaluation factors set forth in the RFR. In this evaluation, technical merit is considered to have greater weight. The Agency PO will initiate and deliver a Task Order Agreement to the selected Master Contractor.

**Master Contractors should be aware that if selected, State law regarding conflict of interest may prevent future participation in procurements related to the RFR Scope of Work, depending upon specific circumstances.**

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**ATTACHMENT 1**  
**RFR RESUME FORM**  
RFR # WCCB6400022

Instructions: Enter resume information in the fields below; do not submit other resume formats. Submit only one resume per Labor Category described in Section 1 of the RFR. If the RFR requests multiple Labor Categories, use a separate resume form for each Labor Category.

Labor Category **Project Manager**  
(from Section 1 of the RFR)

Candidate Name:

Master Contractor:

**A. Education / Training**

Institution Name / City / State	Degree / Certification	Year Completed	Field Of Study
<add lines as needed>			

**B. Relevant Work Experience**

Describe work experience relevant to the Duties / Responsibilities and Minimum Experience / Knowledge / Skill described in Section 3 of the RFR. Starts with the most recent experience first; do not include non-relevant experience.

[Organization] *Description of Work...*  
[Title / Role]  
[Period of Employment / Work]  
[Location]  
[Contact Person (Optional if current employer)]

[Organization] *Description of Work...*  
[Title / Role]  
[Period of Employment / Work]  
[Location]

<add lines as needed>

**C. Employment History**

List employment history, starting with the most recent employment first

Start and End Dates	Job Title or Position	Organization Name	Reason for Leaving
<add lines as needed>			

**D. References**

List persons the State may contact as employment references

Reference Name	Job Title or Position	Organization Name	Telephone / Email
<add lines as needed>			

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<add lines as needed>			
<b>LABOR CATEGORY PERSONNEL RESUME SUMMARY</b> <b>(ATTACHMENT 1 CONTINUED)</b> *"Candidate Relevant Experience" section must be filled out. Do not enter "see resume" as a response.			
<b>Proposed Individual's Name/Company:</b>		<b>How does the proposed individual meet each requirement?</b>	
<b>LABOR CATEGORY TITLE – PROJECT MANAGER</b>			
<b>Requirement</b>		<b>Candidate Relevant Experience *</b>	
<b>Education:</b> 1. Bachelor's Degree from an accredited college or university in Engineering, Computer Science, Information Systems, Business, or other related discipline  Note: Four additional years of experience in IT project management, systems analysis, business process reengineering, and/or requirements development may be substituted for the required education.		<b>Education:</b> 1.	
<b>General Experience:</b> 1. At least five (5) years of experience in project management. 2. PMI certification as a PMP or equivalent, as determined by the PO. 3. Within the past ten (10) years, has at least five (5) years of experience in managing IT related projects. (Each project shall have a dollar threshold of \$2.5 million or more to be considered as meeting this general experience minimum qualification.)		<b>General Experience:</b> 1.	
<b>Specialized Experience:</b> 1. Must demonstrate a senior leadership role in at least three successful projects that were delivered on time and on budget 2. Within the past 10 years, at least three (3) years of project management experience in judicial information systems and case management systems analysis, business process reengineering, functional, technical and data requirements analysis and development, in performing English oral presentations, and in English project documentation preparation 3. At least two (2) years of experience drafting and managing Requests for Proposals for information technology projects		<b>Specialized Experience:</b> 1.	

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<p><b>Additional Required Experience, Knowledge, and Skills:</b></p> <p><b>Education:</b></p> <ol style="list-style-type: none"> <li>1. Master's degree</li> <li>2. Within the past 10 years, completed at least 30 days of professional training in new technologies for developing enterprise information systems and/or new IT project management methodologies</li> </ol> <p><b>Specialized Experience:</b></p> <ol style="list-style-type: none"> <li>3. At least 5 years of experience implementing enterprise application systems using Microsoft software development tools and related products including Visual Studio, .NET Framework 4.0+, C#, ASP.NET, WebAPI, Entity Framework, Team Foundation, SQL Server 2008+, Project 2010+, and Visio 2010+</li> <li>4. Experience in managing projects within the Maryland Department of Information Technology (DoIT) Major Information Technology Development Project (MITDP) process</li> </ol>	<p><b>Additional Required Experience, Knowledge, and Skills:</b></p> <ol style="list-style-type: none"> <li>1.</li> </ol>
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The information provided on this form for this labor category is true and correct to the best of my knowledge:

**Master Contractor Representative:**

\_\_\_\_\_

Print Name

\_\_\_\_\_

Signature

\_\_\_\_\_

Date

**Proposed Individual:**

\_\_\_\_\_

Signature

\_\_\_\_\_

Date

*Instruction: Sign each form.*

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#### ATTACHMENT 2

#### PRICE PROPOSAL

RFR # WCCB6400022

(This form is to be filled out by Master Contractors - Submit as the Financial Response with password protection)

Period 1 (one year)				
	A	B	C	D
CATS+ Labor Category	Fully Loaded Annual Labor Rate*	Fully Loaded Hourly Labor Rate	Evaluation Hours	PERIOD 1 Extended Price (B x C)
Project Manager	\$	\$	2080	\$
Total Period 1 Evaluation Price:				
Period 2 (one year)				
	A	B	C	D
CATS+ Labor Category	Fully Loaded Annual Labor Rate*	Fully Loaded Hourly Labor Rate	Evaluation Hours	PERIOD 2 Extended Price (B x C)
Project Manager	\$	\$	2080	\$
Total Period 2 Evaluation Price:				
Period 3 (one year)				
	A	B	C	D
CATS+ Labor Category	Fully Loaded Annual Labor Rate*	Fully Loaded Hourly Labor Rate	Evaluation Hours	PERIOD 3 Extended Price (B x C)
Project Manager	\$	\$	2080	\$
Total Period 3 Evaluation Price:				
Period 4 (one year)				
	A	B	C	D
CATS+ Labor Category	Fully Loaded Annual Labor Rate*	Fully Loaded Hourly Labor Rate	Evaluation Hours	PERIOD 3 Extended Price (B x C)
Project Manager	\$	\$	2080	\$
Total Period 4 Evaluation Price:				
Period 5 (one year)				
	A	B	C	D
CATS+ Labor Category	Fully Loaded Annual Labor Rate*	Fully Loaded Hourly Labor Rate	Evaluation Hours	PERIOD 3 Extended Price (B x C)
Project Manager	\$	\$	2080	\$
Total Period 5 Evaluation Price:				
<b>Total RFR Price (Sum of Periods 1-5 Prices):</b>				\$

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_____	_____
Authorized Individual Name	Company Name
_____	_____
Title	Company Tax ID #
_____	_____
Signature	Date
<p>*The Agency reserves the right to award each individual position at either the proposed Annual Labor Rate or proposed Hourly Labor Rate. The Annual Labor Rate requires a minimum of 1920 hours worked annually. The Hourly Labor Rate cannot exceed the Master Contract rate, but may be lower. Both rates must be fully loaded, all inclusive, and shall include all direct and indirect costs for the Master Contractor to perform under the TOA. Evaluation Hours are for evaluation purposes only and do not represent actual hours to be worked or invoiced.</p>	

**ATTACHMENT 3  
RFR #\_WCCB6400022MANAGER (PM)  
DUTIES & RESPONSIBILITIES**

<b>1. ROLE DEFINITIONS</b>	
The purpose of this section is to distinguish among the roles interacting with the PM obtained through this RFR.	
A.	Task Order (TO) Procurement Officer – State staff person responsible for managing the RFR process up to the point of TO award.
B.	TO Manager – State staff person who oversees the PM’s work performance and administers the TO once it is awarded.
C.	TO Contractor – The CATS+ Master Contractor awarded a TO as a result of this RFR. The TO Contractor shall provide the PM resource and be accountable for PM work performance under the TO.
D.	Project Manager (PM) – The person provided by the TO Contractor as a result of this RFR. The PM is responsible for overall project planning and execution. The PM is responsible for performing the duties and responsibilities described in Section 3- Scope of Work, Job Description, Job Duties/Responsibilities and in Attachment 3, and for completing all assigned tasks and deliverables under the TO. The PM reports directly to the TO Manager and shall oversee and direct the Project Team made up of State and contractual personnel.
E.	Other Project Contractors – The Contractors responsible for project implementation, including their PM and other personnel assigned to the project. The Contractors report to the PM for project purposes with oversight by the TO Manager.

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<b>2. PROJECT MANAGER DUTIES AND RESPONSIBILITIES</b>	
<p>The PM shall oversee and direct the project team comprised of current State and contractual personnel. Responsibilities include overall project governance and direction, and risk management as needed. Duties shall focus on project monitoring, control, team integration, change integration, and corrective action as needed. The position shall ensure the application of PMI and State SDLC standards in managing the project.</p> <p>The PM shall report to the TO Manager and perform the tasks described in the table below. The PM shall be capable of performing all assigned tasks with self-sufficiency and minimal guidance from the TO Manager. PM performance shall be rated by the State each month, based on performance in the nine PMBOK knowledge areas as applied to the Project, and the quality of the written deliverables described in Section 7 below (See Exhibit 1 – Deliverable Product Acceptance Form for performance rating criteria).</p> <p>The PM shall be accountable for the creation of any and all written deliverables that do not exist for the project and for the updating of those that do exist. The PM shall ensure that all deliverables are consistent with standards in the Project Management Institute (PMI) Project Management Body of Knowledge (PMBOK) and State of Maryland System Development Life Cycle (SDLC) (see Section 3 below).</p>	
<b>PM Project Management Duties</b>	
<p>An asterisk (*) by the section number below and bold italics identifies a deliverable associated with the duty / responsibility. Refer to Section 7 for full descriptions of all deliverables and time of performance.</p>	
2.1	<p>1. Become thoroughly knowledgeable on all aspects of the Pre-EM Tasks and Projects and the EM Project.</p>
2.2	<p>Provide Project Management consistent with PMI and PMBOK principles of project management and the State of Maryland SDLC. Manage and integrate project resources including oversight of the project team. Exercise PM best practices for the Pre-EM Tasks and Projects and EM Project and oversee projects' activities consistent with the nine knowledge areas including:</p> <ol style="list-style-type: none"> <li>1. Procurement Management - consisting of procurement planning, contracts planning, authoring solicitations, evaluation, requesting solicitation responses, selecting contractor(s), administering contract(s), and contract(s) closing activities. <ol style="list-style-type: none"> <li>a. Development of procurement documents, which may include Request for Information (RFI), task order request for proposals (TORFP), purchase order request for proposals (PORFP) and Request for Proposals (RFP)</li> <li>b. Provide counsel and expertise during the evaluation of bid proposals</li> </ol> </li> <li>2. Schedule Management - consisting of activity definition and sequencing, resource estimating, duration estimating, schedule development, and schedule control activities.</li> <li>3. Integration Management - consisting of project plan development, project plan execution, and integrated change control activities.</li> <li>4. Scope Management - consisting of project initiation, scope planning, scope definition and scope change control activities.</li> <li>5. Cost Management - consisting of resource planning, cost estimating, budgeting and cost control activities.</li> <li>6. Human Resources Management - consisting of organizational planning, project team acquisition and staff development activities.</li> <li>7. Risk Management - consisting of risk management planning, risk identification, risk quantitative and qualitative analysis, response planning, monitoring, and control activities.</li> </ol>

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	<p>8. Quality Management - consisting of quality planning, quality assurance and quality control activities.</p> <p>9. Communications Management - consisting of communications planning, information distribution, progress and performance reporting, and stakeholder communications management activities.</p> <p>10. Stakeholder Management – process of developing appropriate management strategies to effectively engage stakeholders throughout the project lifecycle based on analysis of their needs and interests of potential impact on project success</p>
2.3 *	<ol style="list-style-type: none"> <li>1. Create (if necessary) and manage updating of the <b>Project Management Plan (Deliverable 7.1)</b>.</li> <li>2. Ensure that plan components adequately document how the project will be executed, monitored and controlled.</li> <li>3. Ensure that the plan adequately defines the managerial, technical, and supporting processes and activities necessary for sound project development.</li> <li>4. Ensure that the plan adequately covers topics such as Scope Management, Schedule Management, Quality Management, Resource Management, Communications Management, Project Change Management, Risk Management, Procurement Management and others as deemed necessary to manage the project.</li> </ol>
2.4 *	<ol style="list-style-type: none"> <li>1. Create (if necessary) and manage updating of the <b>Work Breakdown Structure (WBS) (Deliverable 7.2)</b> consistent with PMBOK standards for all project work.</li> </ol>
2.5 *	<ol style="list-style-type: none"> <li>1. Create (if necessary) and manage updating of the <b>Integrated Master Schedule (Deliverable 7.3)</b> based on the WBS (see 2.4 above) and usable for tracking project activities.</li> <li>2. This schedule should include all project management, agency and contractor activities in sufficient detail to manage the project.</li> <li>3. The schedule should include milestones, deliverables, periods of performance, degrees of completion, and assigned resources for all project activities.</li> <li>4. The activities duration in the master schedule should be at appropriate level of granularity to manage and track project progress.</li> <li>5. Oversee appropriate updates to the Project Management Plan (see 2.3 above) and related project components as outlined in the SDLC.</li> </ol>
2.6	<ol style="list-style-type: none"> <li>1. Oversee integration of other Project Contractors’ schedules and methodologies into the <b>Integrated Master Schedule</b> (see 2.5 above) to track all project progress.</li> <li>2. Ensure appropriate updates to the Project Management Plan (see 2.3 above) and related project components as outlined in the SDLC.</li> </ol>
2.7 *	<ol style="list-style-type: none"> <li>1. Create (if necessary) and manage updating of the <b>Communications Management Plan (Deliverable 7.4)</b> for all project stakeholders.</li> <li>2. Include stakeholder contact list, distribution structure, description of information to be disseminated, schedule listing when information will be produced and method for updating the communications plan.</li> <li>3. Ensure all appropriate stakeholders have been identified and their requirements and expectations have been documented and managed within the scope of the project.</li> </ol>

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2.8 *	<ol style="list-style-type: none"> <li>1. Create and manage updating of the <b>Risk Management Plan (RMP) and Risk Registry (Deliverable 7.5)</b>.</li> <li>2. At a minimum the RMP shall: <ol style="list-style-type: none"> <li>a. Identify and prioritize potential risks to successful completion of the SDLC Phases.</li> <li>b. Incorporate pertinent risk information found in the Master Project Status Report (see 2.14 below).</li> <li>c. Include a Risk Registry of all project risks that will be updated throughout the project.</li> </ol> </li> </ol>
2.9	<ol style="list-style-type: none"> <li>1. Develop, document and implement escalation and resolution processes for the project and communicate the process to all stakeholders.</li> </ol>
2.10 *	<ol style="list-style-type: none"> <li>1. Ensure the Project Team has created and is updating a <b>Deliverable Comments Matrix (DCM) (Deliverable 7.6)</b> for each deliverable or SDLC product provided by each Project Contractor’s primary point of contact.</li> <li>2. Ensure that the Project Team reviews, and coordinates the review among appropriate stakeholders, of Project deliverables for completeness and conformance to requirements.</li> <li>3. Ensure the Project Team documents resulting issues and questions in the DCM to be resolved by the Development Contractor prior to deliverable acceptance.</li> <li>4. Ensure the Project Team reviews subsequent updated versions of deliverables to confirm all issues and questions have been resolved satisfactorily.</li> <li>5. The DCM process is part of the Quality Assurance Plan (see 2.13 below).</li> </ol>
2.11 *	<ol style="list-style-type: none"> <li>1. Create (if necessary) and manage updating of the <b>Change Management Plan (Deliverable 7.7)</b> that describes the process for making changes to project scope, requirements, or cost as necessary.</li> <li>2. At a minimum, the Change Management Plan shall: <ol style="list-style-type: none"> <li>a. Describe the change management and approval processes to include: <ol style="list-style-type: none"> <li>i. Coordination with the TO Procurement Officer to define change order scope, cost, and project impact of proposed changes to the project;</li> <li>ii. Coordination with the TO Manager for review and approval of proposed changes to the project;</li> <li>iii. Coordination with the Project Team and any Contractors for review and agreement on proposed changes;</li> <li>iv. Coordination with the TO Manager and any Contractors for documentation and implementation of change orders; and</li> <li>v. Project integration management consistent with the PMBOK for approved changes.</li> </ol> </li> <li>b. Describe the tools used (i.e. change request form)</li> </ol> </li> <li>3. Implement organizational change management that includes a holistic approach and process for leading the agency and its people through the plan changes from the Pre-EM Tasks and Projects and EM project including: <ol style="list-style-type: none"> <li>a. building buy-in for the changes</li> <li>b. anchoring the changes in business operations</li> <li>c. ensuring that the employees of the organization are ready willing and able to adopt the</li> </ol> </li> </ol>

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	<p>changes</p> <p>d. managing and measuring the changes so that the changes implemented or sustained in the desired benefits of the changes are realized</p>
2.12 *	<ol style="list-style-type: none"> <li>1. Create and manage updating of the Requirements Traceability Matrix (RTM) (Deliverable 7.8) that describes and provides a numbering system for all project requirements for traceability through testing. The RTM process is part of the Quality Assurance Plan (see 2.13 below).</li> <li>2. The RTM shall include test scenarios and acceptance criteria for all technical and functional requirements.</li> <li>3. Ensure that the Project Team participates in requirements development as needed and traces requirements through testing and implementation via updates to the RTM.</li> <li>4. Ensure that RTM updates are in conjunction with weekly requirements / design reviews (see 2.14 below).</li> <li>5. Work closely with the Project Team and any Contractors to develop or review and update detailed project requirements. Requirements activities may include: <ol style="list-style-type: none"> <li>a. Stakeholder interviews;</li> <li>b. Documenting before and after business processes;</li> <li>c. Review of existing requirements documentation;</li> <li>d. Joint Application Development (JAD) sessions;</li> <li>e. COTS software “gap fit analysis”;</li> <li>f. Demonstrations of existing similar systems (benchmarking); and</li> <li>g. Requirements walkthroughs</li> </ol> </li> </ol>
2.13 *	<ol style="list-style-type: none"> <li>1. Create and manage updating of the Quality Management Plan (Deliverable 7.9).</li> <li>2. At a minimum the QMP shall: <ol style="list-style-type: none"> <li>a. Describe the process for quality management of project deliverables via the DCM process (see 2.10 above).</li> <li>b. Describe the process for quality management of requirements using the RTM (see 2.12 above).</li> <li>c. Describe the processes for quality management of testing, software development and configuration management, as applicable.</li> <li>d. Develop a written procedure for configuration control for application code promotion.</li> </ol> </li> </ol>
2.14	<ol style="list-style-type: none"> <li>1. Ensure creation and ongoing updating of the PM Status Report and Timesheet (Deliverable 7.10).</li> <li>2. At a minimum, the PM Status Report and Timesheet shall: <ol style="list-style-type: none"> <li>a. Report on completed and planned project activities for the reporting period,</li> <li>b. Highlight schedule deviation from baseline,</li> <li>c. Provide schedule updates, progress of work being performed, milestones attained, resources expended,</li> <li>d. Document risks, and issues encountered and corrective actions taken</li> <li>e. Track project cost and expenditures</li> </ol> </li> </ol>
2.15 *	<ol style="list-style-type: none"> <li>1. Ensure creation and ongoing updating of the Master Status Report (Deliverable 7.11). Oversee weekly Project Team meetings, to include any Contractors when appropriate.</li> </ol>

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	<ol style="list-style-type: none"> <li>2. At a minimum the Master Status Report shall contain sections for the following: <ol style="list-style-type: none"> <li>a. Lessons learned from the project and any other pertinent status information.</li> <li>b. Design / requirements reviews and discussions on project status.</li> <li>c. Project status, risk and issue dispositions for the past week, and planned activities for the week upcoming.</li> <li>d. PM activities and needed updates to the Integrated Master Schedule (see 2.5 above), Master RMP (see 2.8 above), and RTM (see 2.12 above).</li> <li>e. Performance as measured against the Project Schedule.</li> </ol> </li> </ol>
2.16	<ol style="list-style-type: none"> <li>1. Ensure project governance and control according to the Project Management Plan (see 2.3 above).</li> <li>2. Work with the Project Team and any Contractors to address schedule variances.</li> <li>3. Ensure the documentation of schedule variances in the Integrated Master Schedule (see 2.5 above) and Master Status Report (see 2.15 above).</li> </ol>
2.17	<ol style="list-style-type: none"> <li>1. Ensure that the Project Team will collect, organize, store, and manage project documents in a central repository. This includes: <ol style="list-style-type: none"> <li>a. Maintaining current and archival files (electronic in primary and backup locations)</li> <li>b. Collecting and distributing information to and from stakeholders</li> <li>c. Entering updates into project tracking systems</li> </ol> </li> </ol>
2.18	<ol style="list-style-type: none"> <li>1. Function as a liaison among Agency personnel, project stakeholders and any Contractors.</li> </ol>
2.19	<ol style="list-style-type: none"> <li>1. Assign other minor duties related to project management support to the Project Team. Minor duties may include: <ol style="list-style-type: none"> <li>a. Responding to phone calls and email</li> <li>b. Scanning and faxing paper documents</li> <li>c. Scheduling and attending ad hoc &amp; recurring meetings</li> <li>d. Engaging in TO performance discussions</li> <li>e. Coordinating Development Contractor invoicing</li> <li>f. Participating in Independent Verification &amp; Validation (IV&amp;V) assessments.</li> </ol> </li> <li>2. Prepare and conduct oral presentations of project related topics for Agency Steering Committee and other stakeholders</li> <li>3. Lead quality reviews and walkthroughs</li> </ol>
2.20 *	<ol style="list-style-type: none"> <li>1. Ensure the creation/updating of a Human Resource Management Plan (Deliverable 7.12).</li> <li>2. At a minimum, the Human Resource Management Plan shall: <ol style="list-style-type: none"> <li>a. Identify project tasks and assignments and work with Agency and any Contractors to resolve workload conflicts.</li> <li>b. Define roles and responsibilities needed for each resource on the project.</li> <li>c. Provide projections for resource and resource utilization.</li> <li>d. Define staff acquisition strategy including backfilling of State resources if applicable.</li> </ol> </li> </ol>

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	<ul style="list-style-type: none"> <li>e. Document staff training plan if required.</li> <li>f. Define organizational structure based on resources.</li> </ul>
2.21 *	<ul style="list-style-type: none"> <li>1. Ensure the creation/updating of a Schedule Management Plan (Deliverable 7.13).</li> <li>2. At a minimum, the Schedule Management Plan shall: <ul style="list-style-type: none"> <li>a. Document tools the project will use to manage the schedule and frequency of updates.</li> <li>b. Define process for how schedule shall be tracked and reported including metrics used to report overall schedule performance.</li> <li>c. Define process for schedule change process, including the process for baselining schedule and approving schedule changes.</li> </ul> </li> </ul>
2.22 *	<ul style="list-style-type: none"> <li>1. Ensure the creation/updating of a Cost Management Plan (Deliverable 7.14).</li> <li>2. At a minimum, the Cost Management Plan shall: <ul style="list-style-type: none"> <li>a. Establish the activities and criteria for planning, structuring, and controlling project costs.</li> <li>b. Establish the project cost baseline through cost estimation and budget determination.</li> <li>c. Define cost estimating and cost controls for the project.</li> <li>d. Define and document how costs and cost variances will be reported regularly.</li> </ul> </li> </ul>
2.23 *	<ul style="list-style-type: none"> <li>1. Ensure the creation/updating of a Procurement Management Plan (Deliverable 7.15).</li> <li>2. At a minimum, the Procurement Management Plan shall: <ul style="list-style-type: none"> <li>a. Define the procedures for how the project will purchase or acquire all products and services needed from outside the team to perform project tasks</li> <li>b. Document procurement management activities for the project.</li> <li>c. Document contract management activities for the project.</li> </ul> </li> </ul>
2.24	<ul style="list-style-type: none"> <li>1. Other project-related duties as assigned by TO Manager which may include but are not limited to: <ul style="list-style-type: none"> <li>a. provide guidance and oversight on aspects of the Pre-EM Tasks and Projects and EM project <ul style="list-style-type: none"> <li>i. technical architecture (hardware, COTS, custom software, security tools, source control)</li> <li>ii. software development standards and guidelines in compliance with the state of Maryland SDLC and evolving Agile methodologies</li> <li>iii. technical and nonfunctional requirements analysis and management</li> <li>iv. functional requirements analysis and management</li> <li>v. business process documentation and business process reengineering (BPR) tools</li> <li>vi. testing management</li> </ul> </li> </ul> </li> </ul>

**3. REQUIRED PROJECT POLICIES, GUIDELINES AND METHODOLOGIES**

The PM shall keep informed of and comply with all applicable laws, regulations, policies, standards and guidelines affecting information technology projects applicable to activities and obligations under the TO Agreement, as

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those laws, policies, standards and guidelines may be amended from time to time. The PM shall adhere to and remain abreast of current, new, and revised laws, regulations, policies, standards and guidelines affecting project execution and it shall obtain and maintain, at its expense, all licenses, permits, insurance, and governmental approvals, if any, necessary to the performance of its obligations under the TO Agreement. These may include, but are not limited to:

A.	The nine project management knowledge areas in the PMI's PMBOK.
B.	The State's SDLC methodology at: <a href="http://www.doit.maryland.gov">www.doit.maryland.gov</a> - keyword: SDLC.
C.	The State's IT Security Policy and Standards at: <a href="http://www.DoIT.maryland.gov">www.DoIT.maryland.gov</a> - keyword: Security Policy.
D.	The State's IT Project Oversight at: <a href="http://www.DoIT.maryland.gov">www.DoIT.maryland.gov</a> - keyword: IT Project Oversight.
E.	Modernization of the State's SDLC, including industry innovations, Agile methodologies, and hybrid processes as adopted by the State

**4. SUBSTITUTION OF PERSONNEL**

A.	<p><b><u>DIRECTED PERSONNEL REPLACEMENT</u></b></p> <p>A. The Agency TO Manager may direct the Master Contractor to replace any contractor personnel who, in the sole discretion of the TO Manager, are perceived as being unqualified, non-productive, unable to fully perform the job duties, disruptive, or known, or reasonably believed, to have committed a major infraction(s) of law or Workers' Compensation Commission Contract, or RFR requirement.</p> <p>B. If deemed appropriate in the discretion of the TO Manager, the TO Manager shall give written notice of any personnel performance issues to the Master Contractor, describing the problem and delineating the remediation requirement(s). The Master Contractor shall provide a written Remediation Plan within three (3) days of the date of the notice. If the TO Manager rejects the Remediation Plan, the Master Contractor shall revise and resubmit the plan to the TO Manager within five (5) days of the rejection, or in the timeframe set forth by the TO Manager in writing. Once a Remediation Plan has been accepted in writing by the TO Manager, the Master Contractor shall immediately implement the Remediation Plan.</p> <p>C. Should performance issues persist despite the approved Remediation Plan, the TO Manager will give written notice of the continuing performance issues and either request a new Remediation Plan within a specified time limit or direct the removal and replacement of the contractor personnel whose performance is at issue. A request for a new Remediation Plan will follow the procedure described in Paragraph B.</p> <p>D. In circumstances of directed removal, the Master Contractor shall provide a suitable replacement for TO Manager approval within fifteen (15) days of date of the notification of directed removal, or the actual removal, whichever occurs first. However, if the TO Manager determines that the State's best interests require removal of the contractor personnel with less than fifteen (15) days' notice, the TO Manager can direct removal in shorter timeframe, including immediate removal.</p> <p>E. Normally, a directed personnel replacement will occur only after prior notification of problems with requested remediation, as described above. However, the TO Manager reserves the right to direct immediate personnel replacement without utilizing the remediation procedure described above.</p> <p>F. Replacement or substitution of contractor personnel under this section shall be in addition to, and not in lieu of, the State's remedies under the RFR or which otherwise may be available at law or in equity.</p>
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B.	<p><b><u>SUBSTITUTION OF PERSONNEL PRIOR TO RFR EXECUTION (AND UP TO 30 DAYS AFTER RFR EXECUTION)</u></b></p> <p>Prior to Task Order Execution or within thirty (30) days after Task Order Execution, the Offeror may substitute proposed candidate only under the following circumstances: vacancy occurs due to the sudden termination, resignation, or approved leave of absence due to an Extraordinary Personnel Event, or death of such personnel. To qualify for such substitution, the Offeror must describe to the State's satisfaction the event necessitating substitution and must demonstrate that the originally proposed personnel are full-time employees with the Offeror</p>
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(subcontractors, temporary staff or 1099 contractors do not qualify). Proposed substitutions shall be of equal caliber or higher, in the State's sole discretion. Proposed substitutes deemed by the State to be less qualified than the originally proposed individual may be grounds for pre-award disqualification or post-award termination.

An **Extraordinary Personnel Event** – means Leave under the Family Medical Leave Act; an incapacitating injury or incapacitating illness; or other circumstances that in the sole discretion of the State warrant an extended leave of absence, such as extended jury duty or extended military service.

C. SUBSTITUTION AFTER 30 DAYS POST RFR EXECUTION

The procedure for substituting personnel after RFR execution is as follows:

1. The Master Contractor may not substitute personnel without the prior approval of the Agency TO Manager.
2. To replace any personnel, the Master Contractor shall submit resumes of the proposed individual specifying the intended approved labor category. Any proposed substitute personnel shall have qualifications equal to or better than those of the replaced personnel.
3. Proposed substitute individual shall be approved by the Agency TO Manager. The Agency TO Manager shall have the option to interview the proposed substitute personnel and may require that such interviews be in person. After the interview, the Agency TO Manager shall notify the Master Contractor of acceptance or denial of the requested substitution. If no acceptable substitute personnel is proposed within the time frame established by the Agency TO Manager, the TO Agreement may be cancelled.

**5. WORK HOURS**

A. The PM will work an eight-hour day between the hours of 7:00 AM and 6:00 PM, Monday through Friday except for State holidays or other office closures, or an alternate work schedule with prior approval of the Agency TO Manager.

B. Duties also may require some outside of business hours, morning, evening and/or weekend hours billed on actual time worked at the proposed hourly rate.

**6. PROJECT MANAGER DELIVERABLES AND TIME OF PERFORMANCE**

*Note – for each of the written deliverables below, ongoing quality will be a factor in the Monthly Performance Rating described in Section 4 above.*

ID #	Deliverable Description	Acceptance Criteria	Time of Performance
6.1	<b>Project Management Plan</b>	MS Word 2010+ document (or mutually agreed upon document format) that defines how the project will be executed, monitored and controlled. The document will be developed with input from the project team and key stakeholders. The plan should address topics including Scope Management, Schedule Management, Financial Management, Quality Management, Resource Management, Communications Management, Project Change Management, Risk Management, and Procurement Management as defined in the PMBOK. The Project Management Plan shall comply with Maryland's SDLC and Attachment 2, Section 2 requirements for the deliverable.	Updated quarterly or as directed by the TO Manager
6.2	<b>Work Breakdown Structure (WBS)</b>	MS Word 2010+ or Excel 2010+ document (or mutually agreed upon document format) that contains tiers showing project milestones or phases in the top level with a breakdown of major project tasks into manageable "work packages" underneath. Work	Updated quarterly or as directed by the TO

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		packages at the bottom level should have no smaller than two-week durations and have measurable, testable, or observable outputs suitable for tracking project progress. The WBS shall comply with Maryland's SDLC and Attachment 2, Section 2 requirements for the deliverable.	Manager
6.3	<b><i>Integrated Master Schedule</i></b>	MS Project 2010+ document (or mutually agreed upon document format) that is based on the WBS (see 6.2 above) and suitable for tracking project activities. At a minimum, the Master Schedule shall show milestones, deliverables, times of performance, degrees of completion and resources for all project activities during the SDLC. The activities durations in the master schedule should have the appropriate degree of granularity to manage and track project progress. This is a single, base-lined and periodically updated deliverable encompassing all project activities. The Integrated Master Schedule shall comply with Maryland's SDLC and Attachment 2, Section 2 requirements for the deliverable.	Update bi-weekly or as directed by the TO Manager
6.4	<b><i>Communications Management Plan</i></b>	MS Word 2010+ document (or mutually agreed upon document format) that captures the stakeholder contact list, the types of information to be disseminated, the format for each type, a schedule of when information will be produced and disseminated, and the method for updating the communications plan. This is a single deliverable maintained throughout the life of project. The Communications Plan shall comply with Maryland's SDLC and Attachment 2, Section 2 requirements for the deliverable.	Updated quarterly or as directed by the TO Manager
6.5	<b><i>Risk Management Plan (RMP) and Risk Registry</i></b>	MS Word 2010+ or Excel 2010+ document (or mutually agreed upon document format) that describes the risk management procedures for the project. The RMP will include a table of potential risks and recommended risk responses, and will incorporate risk information found in deliverables provided by the Development Contractor. This is a single, periodically updated deliverable encompassing all project risks. A <b><i>Risk Registry</i></b> will be created for logging all project risk using MS Excel 2010+ or other appropriate table format. The Risk Management Plan shall comply with Maryland's SDLC and Attachment 2, Section 2 requirements for the deliverable.	Update bi-weekly or as directed by the TO Manager
6.6	<b><i>Deliverable Comments Matrix (DCM)</i></b>	MS Word 2010+ or Excel 2010+ document (or mutually agreed upon document format) that is used to capture comments and recommended changes to each Project deliverable prior to acceptance. A separate DCM is required for each deliverable or SDLC product. The DCM shall comply with Attachment 2, Section 2 requirements for the deliverable.	Project deliverable due date + 5 working days
6.7	<b><i>Change Management Plan</i></b>	MS Word 2010+ document (or mutually agreed upon document format) that describes the procedure for proposing, evaluating, approving, and documenting changes to project scope, schedule, and cost. This Plan should include any tools or templates used for change management, for example, change request form. The Change Management Plan shall comply with Maryland's SDLC and	Updated quarterly or as directed by the TO Manager

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		Attachment 2, Section 2 requirements for the deliverable.	
6.8	<b>Requirements Traceability Matrix (RTM)</b>	MS Word 2010+ or Excel 2010+ document (or mutually agreed upon document format)that describes technical and functional requirements. At a minimum, requirements should be numbered for traceability, testable and the descriptions unambiguous. The RTM should contain acceptance criteria for each requirement and a test method for verifying completion based on the criteria. The RTM shall comply with Maryland’s SDLC and Attachment 2, Section 2 requirements for the deliverable.	Updated bi-weekly or as directed by the TO Manager
6.9	<b>Quality Assurance (QA) Plan</b>	MS Word 2010+ document (or mutually agreed upon document format)that describes how quality, meaning conformance to project requirements, will be monitored throughout the project life cycle. The QA Plan should describe the steps for deliverable review and updating via the DCM process (see 6.6 above). The QA Plan should describe the requirements tracking process via the requirements traceability process (see 6.8 above). The QA plan should define signoff procedures for project milestones and deliverables. The Quality Assurance Plan shall comply with Maryland’s SDLC and Attachment 2, Section 2 requirements for the deliverable.	Updated quarterly or as directed by the TO Manager
6.10	<b>Project Manager Weekly Status Report and Bi-Weekly Timesheet</b>	MS Word 2010+ document (or mutually agreed upon document format)that captures and tracks ongoing PM activities and status. The report will capture activities completed in the past reporting period, activities planned for the following reporting period, and the completion status of project deliverables. The report will describe issues identified on the project and the status of efforts to resolve issues. The timesheet will capture dates and times worked during the past reporting period	Weekly Status Report and Bi-Weekly Timesheet or as directed by the TO Manager
6.11	<b>Master Status Report</b>	MS Word 2010+ document (or mutually agreed upon document format)that captures and tracks ongoing project activities and status. The report will capture activities completed in the past reporting period, activities planned for the following reporting period, the completion status of project deliverables and status of Project costs (planned vs. actual). The report will describe issues identified on the project and the status of efforts to resolve issues and mitigate risks.  The report will have sections describing necessary updates to the Integrated Master Schedule (Deliverable 6.3) and Risk Registry (Deliverable6.5). The report will document lessons learned from the project and any other pertinent status information.	At least bi-weekly or as directed by the TO Manager
6.12	<b>Human Resource Management Plan</b>	MS Word 2010+ or Excel 2010+ document (or mutually agreed upon document format)that describing how and when human resource requirements will be met on the project. The plan shall consider resource needs for the full life of the system including operations and maintenance and address staff acquisition, timing and training needs. The Human Resource Management Plan shall	To be determined by the Project Manager

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		comply with Maryland’s SDLC and Attachment 2, Section 2 requirements for the deliverable.	
<b>6.13</b>	<b><i>Schedule Management Plan</i></b>	MS Word 2010+ document (or mutually agreed upon document format)that establishes the specific procedures for how the project schedule will be managed and controlled and is as detailed as necessary to control the schedule through the life cycle based on the size, risk profile, and complexity of the project. The Schedule Management Plan shall comply with Maryland’s SDLC and Attachment 2, Section 2 requirements for the deliverable.	To be determined by the Project Manager
<b>6.14</b>	<b><i>Cost Management Plan</i></b>	MS Word 2010+ document (or mutually agreed upon document format)that establishes the activities and criteria for planning, structuring, and controlling project costs. The Cost Management Plan shall comply with Maryland’s SDLC and Attachment 2, Section 2 requirements for the deliverable.	To be determined by the Project Manager
<b>6.15</b>	<b><i>Procurement Management Plan</i></b>	MS Word 2010+ document (or mutually agreed upon document format)that define the procedures to purchase or acquire all products and services needed from outside the team to perform project tasks. The document shall define processes for plan purchases and acquisitions including acquisition strategy, contract administration, and contract closure. The Procurement Management Plan shall comply with Maryland’s SDLC and Attachment 2, Section 2 requirements for the deliverable.	To be determined by the Project Manager

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**ATTACHMENT 4 - CERTIFICATION REGARDING INVESTMENTS IN IRAN**

**Authority:** State Finance & Procurement, §§17-701 – 17-707, Annotated Code of Maryland [Chapter 447, Laws of 2012.]

**List:** The Investment Activities in Iran list identifies companies that the Board of Public Works has found to engage in investment activities in Iran; those companies may not participate in procurements with a public body in the State. “Engaging in investment activities in Iran” means:

- A. Providing goods or services of at least \$20 million in the energy sector of Iran; or
- B. For financial institutions, extending credit of at least \$20 million to another person for at least 45 days if the person is on the Investment Activities in Iran list and will use the credit to provide goods or services in the energy of Iran.

*The Investment Activities in Iran list is located at: [www.bpw.state.md.us](http://www.bpw.state.md.us)*

**Rule:** A company listed on the Investment Activities in Iran list is ineligible to bid on, submit a proposal for, or renew a contract for goods and services with a State Agency or any public body of the State. Also ineligible are any parent, successor, subunit, direct or indirect subsidiary of, or any entity under common ownership or control of, any listed company.

*NOTE: This law applies only to new contracts and to contract renewals. The law does not require an Agency to terminate an existing contract with a listed company.*

**CERTIFICATION REGARDING INVESTMENTS IN IRAN**

The undersigned certifies that, in accordance with State Finance & Procurement Article, §17-705:

- (i) it is not identified on the list created by the Board of Public Works as a person engaging in investment activities in Iran as described in §17-702 of State Finance & Procurement; and
- (ii) it is not engaging in investment activities in Iran as described in State Finance & Procurement Article, §17-702.

The undersigned is unable make the above certification regarding its investment activities in Iran due to the following activities:

Name of Authorized Representative: \_\_\_\_\_

Signature of Authorized Representative: \_\_\_\_\_

Date: \_\_\_\_\_ Title: \_\_\_\_\_

Witness Name (Typed or Printed): \_\_\_\_\_

Witness Signature and Date: \_\_\_\_\_