

**Request for Resume (RFR)
CATS II Master Contract**

All Master Contract Provisions Apply

Section 1 –General Information			
RFR Number: (Reference BPO Number)	M00B1400326		
Functional Area (Enter One Only)	FA 10 – IT Management Consulting Services		
Position Title/s or Service Type/s (Short term staff or PMP)			
1. Project Manager			
Anticipated start date	February 1, 2011		
Duration of assignment	Six months with up to two optional years pending approval or through the end of the project within the Master Contract term.		
Designated Small Business Reserve?(SBR): (Enter "Yes" or "No")	YES		
MBE goal, if applicable	0%		
Issue Date: mm/dd/yyyy	12/15/2010	Due Date: mm/dd/yyyy	1/12/2011
		Time (EST): 00:00 am/pm	2:00 PM
Place of Performance:	Department of Health and Mental Hygiene Maryland WIC Program 201 West Preston Street Baltimore, MD 21201		
Special Instructions: (e.g. interview information, attachments, etc.)	<p>Resumes shall be evaluated by a three person evaluation committee in a two tier method. Evaluation criteria will be used to determine a designation of "Poor, Fair, Good, Very Good or Excellent" in each category.</p> <p>In the first tier, the following requirements will be evaluated:</p> <ul style="list-style-type: none"> · Experience in managing complex projects · Education and certifications · WIC and/or EBT experience <p>To be qualified to move to the second tier, the resume must have an overall ranking of "Very Good" or "Excellent."</p> <p>The second tier will then be ranked by number of years of WIC or EBT experience with the longest amount of experience holding the most value. Based on this ranking, the top 5 candidates will be invited to an interview. In the event of a tie in the number of year's experience, the WIC Program reserves the right to interview more than 5 candidates.</p> <p>Interviews will be conducted by a panel of at least three persons using a standardized set of interview questions. The interview</p>		

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	process will be used to determine the final selection of the Project Manager.
Security Requirements (if applicable):	Contractor will be required to obtain a Contractor ID Badge. Contractor shall pass reference checks.
Invoicing Instructions:	Invoices shall comply with all requirements in Section 2.8 of the CATS II Master Contract RFP. Invoices should be based on the calendar month. In addition to the requirements in Section 2.8 of the CATS II Master Contract RFP, the invoice must contain the hourly rate for the PM TO Contractor multiplied by the number of hours worked for the month and the resulting amount due. Travel costs should also be included on the invoice. Supporting documentation for travel costs must be submitted to the TO Manger along with the monthly invoice. The PM TO Contractor shall submit the Deliverable Project Acceptance Form (DPAF) to the TO Manager along with the invoice. Payment will be made after the TO Manager has given the PM TO Contractor a rating of satisfactory or above for the month being invoiced.

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Section 2 – Agency Point of Contact (POC) Information			
Agency / Division Name:	Department of Health and Mental Hygiene Maryland WIC Program		
Agency POC Name:	Jacqueline Marlette-Boras	Agency POC Phone Number:	410-767-5232
Agency POC Email Address:	jboras@dnhmh.state.md.us	Agency POC Fax:	410-333-5683
Agency POC Mailing Address:	201 West Preston Street Baltimore, MD 21201		
Section 3 – Scope of Work			
Background			
<p>WIC is federally funded through the Food and Nutrition Service (FNS) of the US Department of Agriculture (USDA). The program provides healthy supplemental foods and nutrition counseling for pregnant women, new mothers, infants and children under age five. The program has an extraordinary 30-year record of preventing children's health problems and improving their long-term health, growth and development. In 2009, Maryland WIC served over 145,000 women, infants and children each month.</p> <p>WIC services are provided through 18 local agencies distributed across the State. In these local agencies, Maryland WIC clinic staff utilize a web based Management Information System (MIS), WIC on the Web (WOW) to collect and analyze information to determine if applicants meet the criteria for participation in the program. The state of Maryland also hosts the WOW system for the U.S. Virgin Islands WIC Program.</p> <p>Once qualified, program participants receive a comprehensive health and nutrition screening, nutrition and breastfeeding education and a food prescription that is specific to the participant's category (woman, infant or child). Participants are issued checks that specify the type and amount of foods that the participant can buy during a one month period as well as a fruit and vegetable check with a "not to exceed" dollar amount written on the check. The participant uses the checks at an authorized WIC vendor site (grocery store, pharmacy or farmers' market for fruit and vegetable checks) to purchase the foods listed on the check.</p> <p>The Maryland WIC Program would like to begin the activities associated with the implementation of an Electronic Benefit Transfer (EBT) system to replace the current system of issuing paper checks to participants in Maryland as well as the U.S. Virgin Islands. The first task is to submit and obtain approval from the Maryland Department of Information Technology (DoIT) for WIC EBT implementation to be a major information technology development project for the state of Maryland. Once this approval is obtained, the USDA requires that states pursuing EBT must follow a prescribed approach that includes three phases: planning, pilot project implementation and statewide expansion. During these phases, states are required to submit documentation in order to obtain funding for project</p>			

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execution. Documents include, but may not be limited to:

- WIC EBT Planning Advanced Planning Document (PAPD)
- Paper Cost Analysis
- Feasibility Study
- WIC EBT Implementation Advanced Planning Document (IAPD)

Additional detailed information about the EBT planning documents can be found in FNS Handbook 901- Advanced Planning Document Handbook, August 2007:
http://www.fns.usda.gov/apd/Handbook_901/HB901_2007.htm

The Maryland WIC Program is seeking the services of a full time Project Manager who will work in the Maryland WIC Office under the direction of the Maryland WIC Director as the Task Order Manager to carry out the requirements of the State and of the USDA during the planning, pilot and implementation phases of securing an EBT system to deliver benefits to Maryland and U.S. Virgin Island WIC participants.

Job Description/s	
Position Title/s or Service Type/s (From Section 1 Above)	Duties / Responsibilities
1. Project Manager	<p>Under the direction of the Maryland WIC Program Director and with input from an EBT Project team comprised of state and local WIC staff, as well as representatives from the vendor community, the Project Manager will be responsible for planning, overseeing, and controlling the planning, pilot project implementation and statewide expansion phases of EBT implementation in Maryland and the U.S. Virgin Islands, including the necessary steps to prepare all documents (Information Technology Project Request, the PAPD and IAPD required by USDA) and use the state procurement system to procure a contractor who will carry out the pilot and implementation phase. The Project Manager must assure that all activities will be performed in accordance with State and USDA specifications, on time and within budget. The Project Manager must apply PMI or other industry recognized PM methodologies in managing the project.</p> <p>For additional information about the position and a proposed project timeline, see Attachment 3.</p>
Minimum Qualifications	
Position Title/s or Service Type/s (From Section 1 Above)	Required Experience/Knowledge/Skill

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1. Project Manager	<p>For minimum requirements, see CATS II Labor Category for Project Manager. Preferred candidates will also meet the following criteria:</p> <ol style="list-style-type: none"> 1. Minimum of five years experience in managing complex projects for a government agency. 2. Demonstrated ability to quickly comprehend project scope and business requirements. 3. Excellent English communication skills. 4. Excellent ability to understand and express complex topics to a diverse audience. 5. An understanding of system design using Electronic Benefits Transfer. 6. Experience working with the WIC Program or other EBT implementation projects is highly desirable.
Section 4 - Required Submissions	
<p>NOTE:</p> <ul style="list-style-type: none"> - Master Contractors electing <u>not</u> to propose in response to the RFR must submit a "CATS II Master Contractor Feedback Form" located under "Master Contractor Login" on the CATS II web site. - Master Contractors proposing in response to the RFR <u>must</u> submit the following documents: <ul style="list-style-type: none"> o Resume for each position / service type described in the RFR (Attachment 1) o Price Proposal (Attachment 2) o MBE Forms D1 and D2 if applicable (Attachment D in the CATS II RFP) o Conflict of Interest Affidavit (Attachment G in the CATS II RFP) o Living Wage Affidavit (Attachment I in the CATS II RFP) o Documents listed below as required by the hiring agency 	
1. PMI Certification.	
2. Description of projects that the potential contractor has worked on for other government agencies with contact information at those agencies.	
3. Documentation of prior experience with WIC Program or EBT implementation project.	
4. Written References.	
Section 5 – Evaluation Criteria – (Provide a list of evaluation criteria in descending order of importance)	
1. Interview outcome.	
2. Experience in managing complex projects.	
3. Education and certification(s).	
4. WIC or EBT experience.	
5. References.	

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Basis for Award Recommendation

RFRs will be awarded in accordance with the competitive Sealed Proposals process under COMAR 21.05.03. The agency POC 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. The agency POC will initiate and deliver a RFR 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 # MOOB1400326

Instructions: Insert resume information in the fields below; do not submit other resume formats. Submit only one resume per Position or Service described in Section 1 of the RFR. If the RFR requests multiple Positions or Services, use a separate resume form for each proposed candidate.

Candidate Name:	Position Title or Service Type (from Section 1 of the RFR):
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 Required Experience / Knowledge / Skill described in Section 3 of the RFR. Start with the most recent experience first; do not include non-relevant experience.

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

<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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ATTACHMENT 2

RFR PRICE PROPOSAL - PROJECT MANAGER

RFR # MOOB1400326

(This form is to be filled out by Master Contractors)

Year 1 (1/1/2011 – 12/31/2011)			
Hourly Labor Rate	Annual Hours	Year 1 Travel Costs (if needed)	Year 1 Price (Labor Rate x Hours + Travel)
\$		\$ 10,000	
Year 2 (1/1/2012 – 12/31/2012)			
Hourly Labor Rate	Annual Hours	Year 2 Travel Costs (if needed)	Year 2 Price (Labor Rate x Hours + Travel)
\$		\$ 10,000	
Year 3 (1/1/2013 – 12/31/2013)			
Hourly Labor Rate	Annual Hours	Year 3 Travel Costs (if needed)	Year 3 Price (Labor Rate x Hours + Travel)
\$		\$ 10,000	
Year 4 (1/1/2014 – 5/31/2014)			
Hourly Labor Rate	Annual Hours	Year 4 Travel Costs (if needed)	Year 4 Price (Labor Rate x Hours + Travel)
\$		\$ 4,200	
Total RFR Price (Sum of Years 1-4 Prices):			\$

Authorized Individual Name

Company Name

Title

Company Tax ID #

This price proposal must accompany the Project Manager resume provided. The “Hourly Labor Rate” is the actual fully-loaded rate that the State will pay for services recorded in dollars and cents. Hourly rates must be equal to or less than the rates proposed by the Master Contractor for the CATS II Master Contract. A flat rate of \$10,000 per year has been entered for travel costs to other States and/or for attendance at federal or industry sponsored conferences that relate to the project outcome.

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ATTACHMENT 3

**PROJECT MANAGER
DUTIES & RESPONSIBILITIES**

ROLE DEFINITIONS

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 – Agency staff person responsible for managing the RFR process up to the point of TO award;
- B) TO Manager – Agency staff person who oversees the PM’s work performance and administers the TO once it is awarded;
- C) PM – The person provided by the CATS II Master Contractor as a result of this RFR. The PM is responsible for performing the duties and responsibilities described in this SOW, and for completing all requirements and deliverables under the TO. The PM reports to the Task Order (TO) Manager and oversees project work by the EBT Contractor (see D below). The PM strictly represents the Agency for project purposes;
- D) EBT Contractor- The contractor responsible for the development, pilot and state wide implementation of an EBT system that meets the specifications and needs of the Maryland WIC Program.
- E) PM TO Contractor – The CATS II Master Contractor awarded the TO for a PM.

2. DUTIES AND RESPONSIBILITIES

The PM is responsible for project management and coordination of the Maryland WIC EBT Implementation project. The PM will support the management and planning of all efforts associated with the project to include: develop work plans; manage the expectations of all stakeholders; organize and address emerging project requirements; manage project relationships; manage one or more project teams in delivering the project; and communicate and manage activities according to a schedule. Additionally, the PM will assist with any contractor selection tasks during the course of the project.

The PM is expected to create any and all of the written deliverables that do not exist for the project, and review and update those that do exist. The PM will ensure that all deliverables are consistent with standards in the Project Management Institute (PMI) Project Management Body of Knowledge (PMBOK), USDA and with the guidelines presented in the US Department of Agriculture Handbook 901. http://www.fns.usda.gov/apd/Handbook_901/HB901_2007.htm
Other useful references can be found at:
http://www.fns.usda.gov/apd/Library/WIC_EBt_docs.htm

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 quality shall be rated each month (see Attachment 1 – Deliverable Product Acceptance Form for performance rating criteria).

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.

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Project Management Duties	
2.1	Become thoroughly knowledgeable on all current WIC EBT activities to function as the Maryland WIC EBT Implementation Project PM.
2.2*	<p>Provide <i>Project Management Support (Deliverable 7.1)</i> consistent with PMI and PMBOK principles of project management and the SDLC. Manage project resources and define PM best practices for the project and perform project activities consistent with the nine knowledge areas, as applicable, including:</p> <ul style="list-style-type: none"> • Procurement Management - consisting of procurement planning, contracts planning, requesting solicitation responses, selecting contractor(s), administering contract(s), and contract(s) closing activities. • Schedule Management - consisting of activity definition and sequencing, resource estimating, duration estimating, schedule EBT, and schedule control activities. • Integration Management - consisting of project plan EBT, project plan execution, and integrated change control activities. • Scope Management - consisting of project initiation, scope planning, scope definition and scope change control activities. • Cost Management - consisting of resource planning, cost estimating, and budgeting and cost control activities. • Human Resources Management - consisting of organizational planning, project team acquisition, and staff EBT activities. • Risk Management - consisting of risk management planning, risk identification, risk quantitative and qualitative analysis, response planning, monitoring, and control activities. • Quality Management - consisting of quality planning, quality assurance and quality control activities. • Communications Management - consisting of communications planning, information distribution, progress and performance reporting, and stakeholder communications management activities.
2.3*	Create/Update and maintain an ongoing <i>Project Management Plan (Deliverable 7.2)</i> which describes PM processes and activities including how the project will be executed, monitored and controlled. The Plan defines the managerial, technical, and supporting processes and activities and should address 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.
2.4*	Develop a <i>Work Breakdown Structure (WBS) (Deliverable 7.3)</i> consistent with PMBOK standards for all project work.
2.5*	<p>Create/Update and maintain an ongoing <i>Integrated Master Schedule (Deliverable 7.4)</i> based on the WBS (see 2.4 above) and usable for tracking project activities. This schedule should include all project management, agency and contractor activities in sufficient detail to manage the project. The schedule should include milestones, deliverables, periods of performance, degrees of completion, and assigned resources for all project activities. The activities duration in the master schedule should be at an appropriate level of granularity to manage and track project progress.</p> <p>Revise and maintain ongoing updates to the Project Management Plan (see 2.3 above) and related project components as outlined in the SDLC.</p>
2.6*	Create/Update and maintain an ongoing <i>Communications Plan (Deliverable 7.5)</i> for all project stakeholders including stakeholder contact list, distribution structure, description of information to be disseminated, schedule listing when information will

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	be produced and method for updating the communications plan. Ensure all appropriate stakeholders have been identified and their requirements and expectations have been documented and managed within the scope of the project.
2.7*	Create/Update and maintain an ongoing Risk Management Plan (RMP) and Risk Registry (Deliverable 7.6) . The RMP shall identify and prioritize potential risks to successful completion of each phase of the WIC EBT Implementation Project. The RMP shall incorporate pertinent risk information found in the Master Project Status Report (see 2.14 below). The RMP will include a Risk Registry of all project risks that will be updated throughout the project.
2.9	Develop, document and implement and issue escalation and resolution process for the project and communicate the process to all stakeholders.
2.10*	Create/Update a Deliverable Comments Matrix (DCM) (Deliverable 7.7) for each deliverable or SDLC product provided by the EBT Contractor. Personally review deliverables, and coordinate the review of deliverables among appropriate stakeholders for completeness and conformance to project requirements. Document resulting issues and questions in the DCM to be resolved by the EBT Contractor prior to deliverable acceptance. Review subsequent updated versions of deliverables to ensure all issues and questions have been resolved satisfactorily. The DCM process is part of the Quality Assurance Plan (see 2.13 below).
2.11*	Create/Update a Change Management Plan (Deliverable 7.8) that describes the process for making changes to project scope, requirements, or cost as necessary. At a minimum, the Change Management Plan should describe the change management and approval processes, and the tools used (i.e. change request form, change order). Processes should include: <ul style="list-style-type: none"> · Coordination with the TO Manager for review and approval of proposed changes to the project; · Coordination with EBT Contractor for review and agreement on proposed changes; and · For approved changes, project integration management consistent with the PMBOK. Additionally, the PM shall review the existing change management logs and determine which items will be taken forward for further analysis.
2.12*	Create/Update and maintain a Quality Assurance (QA) Plan (Deliverable 7.10) that includes the following components at a minimum: <ul style="list-style-type: none"> · Description of the process for QA on project deliverables via the DCM process (see 2.10 above).
2.13*	Create / Update and maintain a Master Status Report (Deliverable 7.11) . Schedule and lead weekly project team meetings in which design / requirements reviews and discussions on project status, risk and issues occur. Record project status, risk and issue dispositions for the past week, and planned activities for the week upcoming, in the Status Report. The Status Report should have sections describing PM activities and needed updates to the Integrated Master Schedule (see 2.5 above), Master RMP (see 2.8 above). The Master Status Report shall contain a section for lessons learned from the project and any other pertinent status information.
2.14	Coordinate with the EBT Contractor to control the project to the Project Management Plan (see 2.3 above). Work with the EBT Contractor to address schedule variances. Document schedule variances in the Integrated Master Schedule (see 2.5 above) and Master Status Report (see 2.14 above).
2.15	Collect, organize, store, and manage project documents in a central repository. This includes maintaining current and archival files (electronic and paper), collecting and

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	distributing information to and from stakeholders, and entering updates into Agency internal weekly status reports and project tracking systems.
2.16	Function as a liaison between Agency personnel, project stakeholders and the EBT Contractor.
2.17	Perform other minor duties related to project management support as assigned by the TO Manager. Minor duties may include responding to phone calls and email, making photo copies, scheduling and attending ad hoc meetings, engaging in TO performance discussions, coordinating EBT Contractor invoicing, and participating in Independent Verification & Validation (IV&V) assessments.
2.18*	Create/Update and maintain other management plans as deemed necessary by the TO Manager. For example, a <i>Human Resource Management Plan, Cost Management Plan, and Procurement Management Plan (Deliverable 7.12)</i> .
2.19	Manage change orders in accordance with the Change Management Plan (see 2.11 above). Work with the TO Procurement Officer to define change order scope, cost, and project impact. Perform cost-benefit analyses, and provide valid justifications for change orders. Document and coordinate the implementation of change orders with the TO Manager and EBT Contractor.
2.20	Schedule and facilitate weekly status and risk discussions with the EBT Contractor based on project status reports provided by the EBT Contractor. Transfer pertinent status and risk dispositions to the Master Status Report (see 2.14 above).
2.21	Prepare and submit to the Agency quarterly project financial and status reports.
2.22	Have SDLC products available at project team meetings and prepare minutes for all meetings.
2.23	Ensure project governance processes are documented and practiced.
2.24	Review and, as necessary, develop a written procedure for configuration control for application code promotion.
2.25	Coordinate and manage appropriate training for end users.
2.26	Identify project tasks and assignments and work with agency and EBT Contractor to resolve workload conflicts.
2.27	Participate in IV&Vs and provide IV&V contractors with all project artifacts to accurately assess project health as required.
2.28	Work closely with the Agency and EBT Contractor to develop or review and update detailed project requirements. Requirements activities may include: <ul style="list-style-type: none"> · Stakeholder interviews; · Documenting before and after business processes; · Review of existing requirements documentation; · Joint Application Development (JAD) sessions; · COTS software “gap fit analysis”; · Demonstrations of existing similar systems (benchmarking); and · Requirements walkthroughs
2.29	Control the scope of the project leveraging tools and change management activities.
2.30	Other project-related duties as assigned by TO Manager.

3. REQUIRED PROJECT POLICIES, GUIDELINES AND METHODOLOGIES

For the WIC EBT Implementation project, the PM TO Contractor and assigned PM shall keep itself informed of and comply with all applicable laws, regulations, policies, standards and guidelines affecting information technology projects applicable to its activities and obligations under the TO Agreement, as those laws, policies, standards and guidelines may be amended

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from time to time. The PM TO Contractor and assigned 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 IT Security Policy and Standards at: www.DoIT.maryland.gov - keyword: Security Policy.
- C) The State's IT Project Oversight at: www.DoIT.maryland.gov - keyword: IT Project Oversight.
- D) The State's of Maryland Enterprise Architecture at www.DoIT.maryland.gov - keyword: MTAF (Maryland Technical Architecture Framework).

4. MONTHLY PM PERFORMANCE RATINGS

Each month the PM TO Contractor shall submit a Deliverable Project Acceptance Form (DPAF), (see Attachment 4) to the TO Manager for the deliverable Project Management Support (Deliverable 7.1). The TO Manager will rate the PM's performance based on the criteria described in the DPAF. In the event of poor or non-performance by the PM resulting in a rating of "unacceptable," payment shall be withheld pending the outcome of the procedures described in Section 5.

5. MITIGATION PROCEDURES FOR POOR OR NON-PERFORMANCE

As warranted by poor or non-performance by the PM, the Agency shall pursue the following mitigation procedures prior to requesting a replacement PM:

- A) The TO Manager shall document performance issues and give written notice to the PM TO Contractor clearly describing problems and delineating remediation requirement(s).
- B) The PM TO Contractor shall respond with a written remediation plan within three business days and implement the plan immediately upon written acceptance by the TO Manager.
- C) Should performance issues persist, the TO Manager may give written notice or request the immediate removal of PM whose performance is at issue, and determine whether a substitution is required.

6. WORK HOURS

The PM TO Contractor's 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 and Service Reduction Days, if applicable. Services may also involve some evening and/or weekend hours billed on actual time worked at the proposed hourly rate.

7. DELIVERABLES AND TIME OF PERFORMANCE

The table below describes the deliverables required under the TO and corresponding Time of Performance based on Notice to Proceed (NTP).

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ID #	Deliverable Description	Time of Performance
7.1	<p>Project Management Support – Encompasses the duties and responsibilities in Section 2 above and culminates in the overall effective execution and control of the WIC EBT Implementation project. This is a single continuous deliverable encompassing all other deliverables described in this section.</p> <p>Note - The quality of this deliverable is based on PM performance in the nine PMBOK knowledge areas as applied to the WIC EBT Implementation] project, and the quality of the written deliverables in this section.</p> <p>The Project Management Support deliverable shall be assessed by the TO Manager via the process described in Section 4 above.</p>	NTP onward through the duration of the TO
<i>Note – for each of the written deliverables below, ongoing quality will be a factor in the Monthly PM Performance Rating described in Section 4 above.</i>		
7.2	<p>Project Management Plan – An MS Word document 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.</p>	NTP + 40 working days, updated quarterly and as needed
7.3	<p>Work Breakdown Structure (WBS) – A MS Project or MS Visio document with tiers showing project milestones or phases in the top level with a breakdown of major project tasks into smaller “work packages” underneath. Work 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.</p>	NTP + 40 working days.
7.4	<p>Integrated Master Schedule – An MS Project document based on the WBS (see 7.3 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.</p>	NTP + 45 working days, updated as needed.
7.5	<p>Communications Plan – An MS Word document that captures a 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.</p>	NTP + 45 working days , Updates as needed
7.6	<p>Risk Management Plan (RMP) and Risk Registry – An MS Word document that described 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 EBT Contractor. This is a single, periodically updated deliverable encompassing all project risks. A Risk Registry will be created for logging all project risk using MS Excel or other appropriate table format.</p>	NTP + 45 working days, Updates as needed.
7.7	<p>Deliverable Comments Matrix (DCM) – An MS Word document used to</p>	Project

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	capture comments and recommended changes to each deliverable from EBT Contractor, or SDLC product, prior to acceptance. A separate DCM is required for each deliverable or SDLC product.	deliverable due date + 5 working days
7.8	<i>Change Management Plan</i> – An MS Word document 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.	NTP + 45 working days , updated as needed
7.9	<i>Quality Assurance Plan</i> – An MS Word document 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 7.7 above). The QA plan should define signoff procedures for project milestones and deliverables.	NTP + 45 working days , updated as needed
7.10	<i>Master Status Report</i> – An MS Word document that captures and tracks ongoing project activities and status. The report will capture activities completed in the past week, activities planned for the following week, 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 report will have sections describing necessary updates to the Integrated Master Schedule (Deliverable 7.4) and Master RMP (Deliverable 7.6). The report will document lessons learned from the project and any other pertinent status information.	NTP + 35 working days, updated as needed
7.11	Other management plans, such as <i>Human Resource Management</i> , <i>Cost Management</i> , and <i>Procurement Management</i> as well as documents and deliverables deemed necessary by the TO Manager in order to successfully carry out the project.	To be determined by the TO Manager

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8. ESTIMATED TIME LINE- WIC EBT Implementation Project

DATE	ACTIVITY
December 2010	RFR Released
	Local Agencies notified of intent to begin WIC Implementation Project
	Vendors notified of intent to begin WIC Implementation Project
	WIC EBT Implementation Team (WEIT) formed (staff and vendors)
January 2011	Project Manager Identified
February 2011	Begin Planning Phase
	WIC EBT Implementation Project begins
	Initial Meeting of WEIT
	Deliverables as identified above
	Submit ITPR to DoIT for review
	Submit PAPD to USDA for review
March 2011	Review and finalize deliverables as above
	Project Manager visits to Local Agency and vendor sites
	Project Manager to attend training on current MIS system
	Deliverables as identified above
April 2011	Site visits to view other EBT Systems, if necessary
	WEIT Meeting
	Deliverables as identified above
May 2011	Begin Feasibility Study
	MIS Gap Analysis
	Deliverables as identified above
June 2011	Draft of Cost Analysis
	WEIT Meeting
	Submit EBT Grant Application to USDA (assuming State approval of ITPR)
	Deliverables as identified above
July 2011	Final Cost Analysis
	Draft Feasibility Study
	Deliverables as identified above
August 2011	Final Feasibility Study
	Deliverables as identified above
September 2011	WEIT Meeting
	Deliverables as identified above

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DATE	ACTIVITY
October 2011	Begin development of IAPD (assuming USDA approval of PAPD)
	Begin procurement process for EBT Contractor and IV&V Contractor
	Deliverables as identified above
November 2011	Submit IAPD to USDA for review
	WEIT Meeting
	Deliverables as identified above
March 2012	Release RFP for EBT Contractor
	Release RFP for IV&V Contractor
	Deliverables as identified above
April 2012	Receive/evaluate bids for IV&V Contractor
	Receive/evaluate bids for EBT Contractor
	WEIT Meeting
	Deliverables as identified above
May 2012	Select EBT Contractor /Initial Meeting
	Select IV&V Contractor/Initial Meeting
	Deliverables as identified above
August 2012	Begin Pilot Planning Phase
	WEIT Meetings- March, May and July
	Develop pilot plan
	Draft statewide implementation plan
	Procure necessary equipment for pilot
	Implement necessary changes to MIS System
	Prepare infrastructure for pilot project
	Train Local Agency staff and vendors participating in pilot
	Deliverables as identified above
January 2013	EBT pilot in local agencies begins
	WEIT Meetings- September and November
	Procure necessary equipment for statewide implementation
	Prepare infrastructure for statewide implementation
	Ongoing evaluation and adjustments to pilot project
	Deliverables as identified above
June 2013- March 2014	Final evaluation of pilot project
	Finalize statewide implementation plan
	Train Local Agency staff and vendors for statewide implementation
	Phased-in statewide rollout of EBT
	Deliverables as identified above

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ATTACHMENT 4

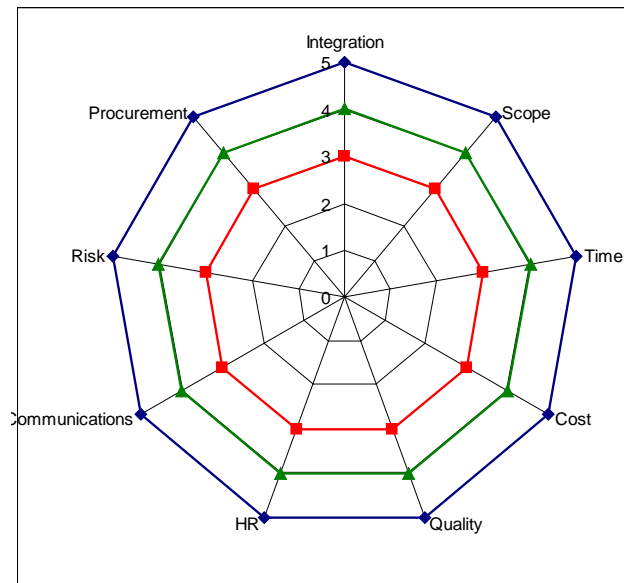
**DELIVERABLE PRODUCT ACCEPTANCE FORM (DPAF)
PM PERFORMANCE
DELIVERABLE ID # 7.1**

(Submitted monthly by the PM TO Contractor)

PM TO Contractor:
Date Submitted:
Performance Period (Month / Year):
Agency Name:
TO Manager / Agency Contact:
Reference BPO #

The Information Below Shall Be Filled-In by the Agency

DELIVERABLES AND PROJECT MANAGEMENT PERFORMANCE RATING DISPOSITION:



PM Processes	Rating**
Procurement Management	
Schedule Management	
Scope Management	
Cost Management	
Risk Management	
Human Resources Management	
Quality Management	
Communications Management	
Integration Management	
Total Average Score	

**Rating is based on *Monthly Project Management Process Evaluation Rating Criteria Sheet*. Project Manager should maintain score of 3 or higher for each process area and/or average score of 3. Scores below 3 are deemed poor or non-performance and the TO Manager should follow the Mitigation Procedures as defined in Section 5 above.

Deliverable # 7.1 is acceptable.

Deliverable # 7.1 is rejected (for reasons indicated below).

REASON(S) FOR UNACCEPTABLE PROJECT MANAGER PERFORMANCE RATING (List Deliverables or PM Process Areas):

TO Manager Signature

Date Signed

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Monthly Project Management Process Evaluation Rating Criteria

The TO Manager will evaluate and rate Project Manager's performance on an ongoing basis for each of the nine Knowledge Areas below. Processes should be at score of 3 or higher for applicable processes.

Rating

Project Integration Management		
0	Not applicable for project.	Indicators of Process
1	Project Manager has not established practices, standards, or processes for project. Work performed in ad hoc fashion and does not include integration management.	1. Project Charter
2	Project Manager has established basic, documented processes for project planning and reporting exist. Management only involved on high-visibility projects.	2. Project Management Plan (PMP)
3	Project Manager has institutionalized the Project integration efforts with documented procedures and standards. PM is beginning to integrate all project data.	3. Integrated Project Plan
4	Project Manager utilizes processes/standards for project on a regular basis and integrated with other processes/systems. Decisions on project based on performance metrics.	4. Updated Project Schedule
5	Project Manager has established best practices including project integration improvement procedures utilized. Lessons learned are regularly examined and used to improve documented processes.	
Project Scope Management		
0	Not applicable for project.	Indicators of Process
1	Project has general statement of functional requirements. Little or no scope management or documentation for project. Management and stakeholders are aware of key milestones only.	1. Project Scope Statement
2	Project Manager has put basic scope management process in place. Scope management is meeting techniques irregularly.	2. Change Request and Approval Process
3	Project Manager has implemented full project management process documented and is actively utilizing process on regular basis. Stakeholders are engaged and actively participating in scope decisions.	3. Requirements Traceability Matrix (RTM)
4	Project Manager is utilizing full project management processes for the project. Projects managed and evaluated in light of other competing requirements.	4. Change Control Board
5	Project Manager's effectiveness and efficiency metrics drive project scope decisions by appropriate levels of management.	
Project Time/Schedule Management		
0	Not applicable for project.	Indicators of Process
1	Project Manager has not established planning or scheduling standards. Lack of documentation makes it difficult to achieve repeatable project success.	1. WBS
2	Project Manager has established basic processes, but is not performing planning and scheduling on a regular basis.	2. Schedule Management Plan
3	Project Manager has established document time management processes and utilizes on a regular basis. Project-wide integration includes project dependencies.	3. Activities duration based on historic data
4	Project Manager has established good practices in time management including utilization of historical data to forecast future performance. Project management decisions based on efficiency and effectiveness metrics.	
5	Project Manager has additionally incorporated improvement procedures utilized for time management processes. Lessons learned are examined and used to improve documented processes.	
Project Cost Management		
0	Not applicable for project.	Indicators of Process
1	Project Manager has not established practices or standards. Cost process documentation is ad hoc and individual project members follow informal practices.	1. Cost Estimates Activity
2	Project Manager has established processes exist for cost estimating, reporting, and performance measurement. Cost management processes are used for the project.	2. Project Cost Baseline
3	Project Manager has standardized cost management practices for project team. Costs are fully integrated and reflect the true cost of the project.	3. Cost Management Plan
4	Project Manager has integrated cost planning and tracking with Project Office, financial, and human resources systems. Standards tied to agency processes.	4. Cost Control
5	Project Manager leverages lessons learned to improve documented processes. Project Manager and management are actively using efficiency and effectiveness metrics for decision making.	
Project Quality Management		
0	Not applicable for project.	Indicators of Process
1	Project Manager has not established project quality practices or standards. Management is considering how they should define "quality".	1. Quality Assurance Plan
2	Project Manager has established basic organizational project quality policy has been adopted. Project Management and Team encourage quality processes and policy for project.	2. Deliverables Acceptance Criteria defined
3	Project Manager has established well documented quality management process and instituted standards for the project. Regular quality management activities are being executed including deliverables	3. User Acceptance Criteria (UAC) per SDLC phases
		4. Formal Deliverable

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	acceptance.	Acceptance Process
4	Project Manager has best practices for standard quality management processes. Management is actively involved in coordinating quality standards and assurance. Some metrics are developed.	
5	Project Manager has implemented guidelines for implementing improvements back into the process. Metrics are key to product quality decisions throughout the SDLC.	
Project Human Resource Management		
0	Not applicable for project.	Indicators of Process
1	Project Manager has not performed planning and staffing activities for project. Project teams are ad hoc. Human resource time and cost is not measured.	1. Organization Chart
2	Project Manager has put processes in place that defines how to plan and manage human resources. Resource tracking is loosely performed for project.	2. Roles and responsibilities matrix
3	Project Manager has established a regularly resource management process. Professional EBT program activities for team and organization have been established for successful implementation of project.	3. Staffing Management Plan
4	Project Manager has implemented resource management best practices including resource forecasts used for project planning and prioritization. Project team performance measured and integrated with team EBT.	4. Team Training Plan
5	Project Manager includes HR processes which engage teams to document project lessons learned. Improvements are incorporated into human resources management process.	5. Team performance assessment
Project Communication Management		
0	Not applicable for project.	Indicators of Process
1	Project Manager performing communications management on an ad hoc basis with informal status reports to management.	1. Communication Management Plan
2	Project Manager has established basic communications process including Communications Management Plan. Project progress reporting is occurring on a more regular basis.	2. Project Performance Reports
3	Project Manager has active involvement by executing a formal project communications plan. All stakeholders and project team members are aware of communications process.	3. Stakeholder Contact
4	Project Manager has implemented best practices for communications management plan for the project.	4. Processes for communication of Risk, Issues and Decisions
5	Project Manager has put additional improvement process in place to continuously improve project communications management. Lessons learned are captured and incorporated.	
Project Risk Management		
0	Not applicable for project.	Indicators of Process
1	Project Manager has not established any risk management practices or standards for project. Documentation is minimal and results are not shared. Risk response is reactive.	1. Risk Management Plan
2	Project Manager has established basic risk management processes and have documented for the project. Team members are involved with risks process and risks are shared for project.	2. Risk Register
3	Project Manager has established regular risk management processes and risk activities, including identification and mitigation planning, are actively utilized for project.	3. Process for Risk Register updates and communication of risk
4	Project Manager has integrated risk processes with all aspect of project reporting including time, cost, and resource systems. Metrics are used to support risk decisions for the project.	4. Contingency plans for risk
5	Project Manager has establish best practices in risk management including continuous improvement processes to ensure project is continually measured and managed against performance metrics.	
Project Procurement Management		
0	Not applicable for project.	Indicators of Process
1	Project Manager has not established procurement process for project. Processes are ad hoc at best with no clear plan defined.	1. Procurement Management Plan
2	Project Manager has established basic process for procurement of goods and services for project. Procurement Management Plan has been developed for procurement of all project goods and services.	2. Contract Statement Of Work
3	Project Manager has established standards for procurement management on project and integrated with Agency processes.	3. Evaluation Criteria
4	Project Manager has leverage procurement management best practices such as make/buy decisions for the agency and project. Project procurement practices are integrated with project management mechanisms.	4. Cost Benefit Analysis
5	Project Manager has instituted on-going process improvements focus on procurement efficiency and effective metrics.	5. Make/Buy Decisions

- END DOCUMENT -