

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

All Master Contract Provisions Apply

Section 1 –General Information			
RFR Number: (ADPICS PO Number)	N00B1400375		
Functional Area (Enter One Only)	Functional Area 10 – IT Management Consulting Services		
Position Title/s or Service Type/s (Short term staff or PMP)			
Project Manager – Enterprise Content Management System (ECMS)			
Anticipated start date	06/01/11		
Duration of assignment	2 years, with one one-year renewal option		
Designated Small Business Reserve?(SBR): (Enter "Yes" or "No")	Yes		
MBE goal, if applicable	0%		
Issue Date: mm/dd/yyyy	3/30/11	Due Date: mm/dd/yyyy	04/20/11
		Time (EST): 00:00 am/pm	2:00 PM EST
Place of Performance:	<p>Department of Human Resources 311 West Saratoga Street Baltimore, MD 21201</p> <p>- and/or -</p> <p>Department of Human Resources 1100 Eastern Boulevard Baltimore, MD 21221</p> <p>And/or Department of Human Resources 6800 Deerpath Road Elkridge, MD</p> <p>Onsite work at local departments of social services during the roll-out of the ECM solution may also be required during the duration of the project.</p>		
Special Instructions: (e.g. interview information, attachments, etc.)	Interviews will be scheduled by Theresa Monga, Procurement Officer. Theresa Monga will also furnish time and location information as applicable. Interviews must be in-person and will be conducted using a standardized set of interview questions for all candidates. Candidates will be notified of interviews after the		

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	submission is closed (After 05/01/11).
Security Requirements (if applicable):	<ol style="list-style-type: none"> 1. Unless otherwise determined by DHR, the Master Contractor shall provide its own laptop. Master Contractor equipment shall meet or exceed DHR's standards for virus protection and security. Please note any deliverables produced must be produced in a version of software that is compatible with DHR's version. For example Microsoft Office 2003 - MS Word, PowerPoint, Excel, etc., Adobe version 7. 2. When visiting State facilities, the Master Contractor shall adhere to all State security requirements. This includes presenting photo ID, providing information for the obtaining of State-issued Contractor-badges, and at the discretion of DHR management, wearing Master Contractor-issued and State-issued security badges prominently when inside State facilities and presenting ID upon request at any time. The Master Contractor shall: <ol style="list-style-type: none"> A. Abide by the State's policies and procedures in force at each site. B. Abide by the State's Security policies and procedures in force at each site such as not connecting equipment or other devices to the State's data network without prior approval of the State. C. Ensure that all staff working under this Contract agree to familiarize themselves with the requirements of the State of Maryland Information Technology Security Policies and any accompanying State and federal regulations, and shall comply with all applicable requirements in the course of this Contract. D. Ensure that all staff working under this Contract cooperates with the State in the course of performance of the Contract so that both parties shall be in compliance with State Information Technology requirements and any other State and Federal computer security regulations including cooperation and coordination with the auditors, Department of Information Technology and other compliance officers. E. Agree to enter into a connectivity agreement with DHR. The agreement shall include, but not be limited to, the following: <ol style="list-style-type: none"> 1. Not attaching any non-State owned computers to any State network without prior permission and assurances that the State security standards are met. Commercially available diagnostic tools may receive a blanket approval

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	<p>for use on the network, state owned PCs or other equipment as necessary to diagnose and resolve incidents.</p> <ol style="list-style-type: none"> 2. Security settings must be maintained to meet or exceed State security standards. 3. Once established, no security provisions for firewalls, client, and server computers shall be modified without written State approval. 4. Current updated virus software and virus definition files that are enabled to perform real time scans shall be maintained on all Master Contractor-supplied hardware. 5. Dialup modem use is specifically disallowed while attached to the State network. 6. Master Contractor shall not install or utilize remote control or file sharing software unless explicitly approved by the State. 7. Master Contractor shall sign any documents that are reasonably necessary to keep the Contractor in compliance with the State IT Security Policies. <p>F. The Master Contractor shall not install, connect or attach any of its equipment to the state LAN/WAN without express written permission from DHR. Examples of equipment would include but not be limited to PCs, printers, routers, switches and servers.</p> <p>Failure to comply with state security requirements on the part of the Master Contractor or any of its designees will be regarded as a breach of the Contract and may be followed by termination for default. State Information Technology Security Policies and Standards can be found at : http://doit.maryland.gov/support/pages/securitypolicies.aspx</p>
<p>Invoicing Instructions:</p>	<ol style="list-style-type: none"> 1. Invoices shall be submitted monthly for the prior month's work. Invoices must be submitted by the 15th business day of the month following the month the services were provided. Invoices must be accompanied by status reports that account for all hours billed and the activity that was being performed. Upon verification and acceptance of the invoices, payment will be made to the Master Contractor. 2. Invoice payments to the Master Contractor shall be governed by the terms and conditions defined in the CATS II Master Contract. Invoices for payment shall contain the Master Contractor's Federal Employer Identification Number (FEIN), as well as the information described below, and must be submitted to the DHR Project Manager for payment approval. 3. This procedure consists of the following requirements and

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	<p>steps:</p> <p>A. The invoice shall identify Department of Human Resources/Office of Technology for Human Services, labor category, associated Contract Agreement number, date of invoice, period of performance covered by the invoice, and a Contractor point of contact with telephone number.</p> <p>B. The Master Contractor shall send the original of each invoice and supporting documentation (itemized billing reference for employees, including detail of work hours) submitted for payment to Department of Human Services/Office of Technology for Human Services at the following address:</p> <p align="center"><u>Attention:</u> Applications Director, 1100 Eastern Blvd., Essex, Maryland, 21221</p> <p>C. Invoices for final payment shall be clearly marked as "FINAL" and submitted when all work requirements have been completed and no further charges are to be incurred under the Contract Agreement. In no event shall any invoice be submitted later than 60 calendar days from the Contract Agreement termination date.</p>
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Section 2 – Agency Point of Contact (POC) Information

Agency / Division Name:	Maryland Department of Human Resources (DHR) Office of Technology for Human Services (OTHS)		
Agency POC Name:	Theresa Monga Procurement Officer	Agency POC Phone Number:	410-767-9682
Agency POC Email Address:	tmonga@dhr.state.md.us	Agency POC Fax:	410-333-0433
Agency POC Mailing Address:	311 W. Saratoga Street Baltimore, MD 21201		

Section 3 – Scope of Work

Background

The Maryland Department of Human Resources (DHR) Office of Technology for Human Services (OTHS) is seeking a Project Manager (PM) with the demonstrated expertise to manage the Enterprise Content Management Solution (ECMS) project. The ECMS project is ground-breaking for the Department and requires an organized, results-oriented Project Manager who will be able to communicate and coordinate effectively with DHR OTHS, the selected contractor for the ECMS and other third-party contractors that provide critical data center, hosting, applications maintenance, and management consulting services for DHR.

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The Department desires a PM with documented successful experience managing a project similar in size, scope and complexity of the ECMS project. The Task Order Request for Proposals (TORFP) for the ECMS is currently available through Consulting and Technical Services II (CATS II) TORFP Status page on the Maryland Department of Information Technology website at: <http://doit.maryland.gov/contracts/Pages/CATSII TORFPStatus.aspx>

The ECMS will be a secure solution for imaging and retrieving client documents from the Family Investment Administration (FIA) and Child Support Enforcement Administration (CSEA) customers. FIA and CSEA workers will use the ECMS to create and access electronic case files and facilitate the secure sharing of information across the Department.

All work must adhere to DHR's System Development Life Cycle (SDLC) methodology. All work must also adhere to the standards, processes and procedures set forth by DHR's Enterprise Program Management Office (EPMO). This task may require the Master Contractor to meet with multiple levels of employees (front-line worker, team leader, middle manager, senior manager, DHR Executive Leadership, etc.) within DHR's business areas in the course of understanding the Department's ECM needs. DHR values a team approach to project work efforts; the proposed resource for this project must possess exemplary communication and people skills and be skilled in facilitating all project team interactions.

Job Description/s	
Position Title/s or Service Type/s (From Section 1 Above)	Duties / Responsibilities
1. Project Manager	<ol style="list-style-type: none"> 1. The Master Contractor PM's working hours shall be consistent with those of the DHR staff that is supported. It is expected that the PM will work evenings, nights, weekends, holidays, and other non-standard work hours to complete the tasks outlined in this RFR and as the work and DHR dictate. Services requiring non-standard work hours may include but are not limited to: issue resolution and research, work required to meet established deliverable due dates, and other activities that must occur outside regular business hours to meet the needs of this RFR. 2. The Master Contractor shall be precluded from development, implementation, or hosting projects for the Maryland Department of Human Resources that result from the Master Contractor's activities under this RFR. The Master Contractor shall be precluded both as the prime and as a subcontractor. 3. In addition, certain other opportunities may result in a conflict of interest, and it shall be the responsibility of the Master Contractor to assure that they do not engage in additional business development activities related to DHR without first consulting with the agency and obtaining a formal opinion so as to avoid any potential conflict of interest. Should the DHR Project Manager learn that the Master Contractor has

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	<p>failed to observe these guidelines, the PM shall be immediately dismissed from the engagement.</p> <p>4. The PM will deliver all notes, meeting minutes, work papers and project artifacts to the Office of Technology for Human Services upon request and/or at the conclusion of this engagement.</p> <p>5. The PM will provide a weekly status report to the Chief Information Officer and/or designees (content and format to be determined jointly by DHR and the Master Contractor PM following start of engagement).</p> <p>6. Follow additional requirements as provided in Attachment 3.</p>
Minimum Qualifications	
Position Title/s or Service Type/s (From Section 1 Above)	Required Experience/Knowledge/Skill
1. Project Manager	<ol style="list-style-type: none"> 1. Bachelor's Degree or equivalent experience at least four (4) years) in a technical field. 2. At least five (5) years experience with Enterprise Content Management solutions in the past ten (10) years. 3. Experience with implementation and roll-outs of content management solutions. 4. Excellent communication skills. 5. Project Managers Certification from a certified institute is required. 6. At least five (5) years of project management experience 7. Specific work experience and relevant project management experience as defined by the resume and the interview. Please note Master Contractor may only submit ONE candidate to fill the position. Candidate must certify availability. 8. Knowledge, skills, training and education as defined by the resume. 9. Responses to interview questions. 10. Three references.

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Section 4 - Required Submissions

NOTE:

- Master Contractors electing not to propose in response to the RFR must still 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 must submit the following documents:
 - o **One** Resume for this position / service types as described in the RFR
 - o Conflict of Interest Affidavit (Attachment G in the CATS II RFP)
 - o Living Wage Affidavit (Attachment I in the CATS II RFP)
 - o CATS II Master Contractor Feedback Form (See location above)
 - o **Documents listed below as required by the hiring agency:**

1. Copy of PM certificate .
2. Evidence of required training or education or equivalent.
3. One resume in attached resume format that clearly cross-walks candidate's experience to required qualifications.
4. Candidate must certify availability.
5. Fixed Price- must be inclusive of travel as expenses will not be paid separately.

Section 5 – Evaluation Criteria – (Provide a list of evaluation criteria in descending order of importance)

1. Specific work experience and relevant project management experience as defined by the resume and the interview (**minimum qualifications listed in the RFR**). Please note Master Contractor may only submit ONE candidate to fill the position. Candidate must certify availability.
2. Knowledge, skills, training and education as defined by the resume.
3. Responses to interview questions.
4. Three references.
5. Fixed Price – must be inclusive of travel as expenses will not be paid separately.
6. Bachelor's Degree or equivalent experience at least four (4) years in a technical field.
7. At least five (5) years experience with Enterprise Content Management solutions in the past ten (10) years.
8. Experience with implementation and roll-outs of content management solutions.
9. Excellent communication skills.
10. Project Manager's Certification from a certified institute is required.
11. At least five (5) years of project management experience.

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 # N00B1400375

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**

RFR # N00B1400375

Proposed Labor Category	Fixed Hourly Labor Rate	Estimated Hours for 12 Months	Total Price Per Year
Project Manager (Base Year 1)		2100	
Project Manager (Base Year 2)		2100	
Project Manager (Option Year 1)		2100	
Total RFR Price (sum of Project Manager Price) Base Year			\$
Total RFR Price Option Year (sum of Project Manager Price_			\$
Grand Total of RFR (Base year plus Option Years)			\$

Authorized Individual Name

Company Name

Title

Company Tax ID #

Proposed labor categories must be from those described in the CATS II Master Contract and must correspond to the resume (s) provided. The “Hourly Labor Rates” is the actually fully-loaded rate that the state will pay for services recorded in dollar and cents. Hourly rates must be equal to or less than the rates proposed by the Master Contractors for the CATS II Master Contract.

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ATTACHMENT 3

PROJECT MANAGER – DESIRED ABILITIES AND SKILLS

1. Project management experience on medium to large sized COTS integration and/or custom development software projects.
2. Strong understanding of the complete systems development lifecycle from project inception through operations and maintenance.
3. Project management and leadership skills in leading technical personnel through the delivery of complex projects.
4. Experience in managing vendors.
5. Strong decision making and problem solving skills and experience with project delivery.
6. Excellent business analysis skills.
7. Excellent technical background.
8. Excellent English communications skills.
9. Excellent ability to understand and express complex topics.
10. Skills to create and manage detailed project plans and budgets with prior experience at the strategic and tactical / implementation levels.
11. Strong management skills, to include resource allocation and planning skills with software development projects.
12. Demonstrated ability to quickly comprehend project scope and business requirements.
13. Demonstrated ability to work effectively with non-technical teams.
14. Demonstrated knowledge of scanning applications and solutions.

PROJECT MANAGER – DUTIES AND RESPONSIBILITIES

1. Support the management and planning of all efforts associated with the projects to include: develop and manage work plans, define and deliver individual project deliverables as a part of the overall program deliverables, manage the expectations of all stakeholders, manage budgets, organize and address emerging project requirements, manage project relationships, manage one or more project teams in delivering the projects, and communicate and manage tasks and activities to a schedule with the team.
2. Oversee and manage the ECMS TO Contractor's project management team's efforts, to include: project plan, scope management, budget management, resource management, time management (activities & task planning), communications, risk, procurement, QA and testing, user training, program / project delivery, transition planning, and ongoing maintenance and support management.
3. Manage ECMS TO Contractor's assignments, contract issues and assigned tasks, conduct quality assurance reviews of contractor's output, and develop acceptance criteria for vendor supported tasks.
4. Assist ECMS TO Contractor with coordination of site visits, deployments, and internal DHR/OTHS meetings.

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5. Report project progress, issues, risks, etc. to EPMO Project Managers.
6. Support various business and technology teams as necessary during project implementation to ensure solid, scalable, robust solutions.
7. Communicate effectively in both verbal (i.e., day-to-day discussions, team meetings) and written (status reports, change requests) form, as well as have an overall ability to be clear and concise in all communications.
8. Accurately assess the risks associated with the project and systematically manage and report on project risks.
9. Ensure that the solutions meet all the functional and non-functional requirements as stated in the ECMS Contract.
10. Ensure that solutions conform to industry best practices and Maryland state standards.
11. Ensure that sound development practices are taking place in requirements management, systems testing, and configuration management.
12. Oversee development of test plans and manage acceptance test execution.
13. Effectively manage multiple priorities.
14. Perform additional job-related duties as requested.

PROJECT MANGER DELIVERABLES

1. Oversee and manage the ECMS TO Contractor's Project Management Plan and other project plans on a weekly basis.
2. Complete and files all minutes of meetings between DHR and the ECMS TO Contractor and store them in a designated space to be identified after NTP. Meeting notes shall be due within four (4) business days of a meeting.
3. Prepare a weekly status report for DHR. The status report must cover the milestones due that month and any overdue milestones, status of all tasks, new risks identified, scope changes and any other project issues. Issues must include identification, escalation and resolution steps. Report due dates will be determined by the TO Manager after NTP.
4. Prepare the TO Manager status reports as required by DHR. Format and frequency will be determined after NTP.
5. Develop a Requirements Traceability Document and maintain the document throughout the project phases.
6. Develop project strategy documents.
7. Manage Change Control, Issues escalation and resolution, Schedule, Costs, and Resources as defined in the project management plan.
8. Ensure appropriate product-related training and documentation are developed and made available to customers through project team meetings.
9. Develop and utilizes a communications plan for project stakeholders.
10. Prepare and validates functional requirements and provides support for the TO/TORFP process.
11. Review and ensure all ECMS TO Contractor deliverables as stated in the ECMS Contract are complete, adhere to standards and contract requirements and meet the State SDLC methodology.
12. Prepares all other required DOIT SDLC project documentation.