

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

All Master Contract Provisions Apply

Section 1 –General Information			
RFR Number: (ADPICS PO Number)	N00P0401247		
Functional Area (Enter One Only)	Functional Area 17 – Documentation/Technical Writing		
Position Title/s or Service Type/s (Short term staff or PMP)			
1. Subject Matter Expert			
2. Technical Writer			
Anticipated start date	September 8, 2009		
Duration of assignment	Six months from start date of resource		
Designated Small Business Reserve?(SBR): (Enter "Yes" or "No")	No		
MBE goal, if applicable	0%		
Issue Date: mm/dd/yyyy	08/27/09	Due Date: mm/dd/yyyy	09/2/09
		Time (EST): 00:00 am/pm	4:00 PM EST
Place of Performance:	Department of Human Resources 311 West Saratoga Street Baltimore, MD 21202 - and/or - Department of Human Resources 1100 Eastern Boulevard Baltimore, MD 21221 Please note site visits may also be required to Local Departments of Social Services. No more than five (5) site visits are expected.		
Special Instructions: (e.g. interview information, attachments, etc.)	Interviews will be scheduled by Hattie Crosby, Procurement Supervisor. Ms. Crosby will also furnish time and location information as applicable. Interviews must be in-person and will be conducted by a panel using a standardized set of interview questions for all candidates. Candidates will be notified of interviews after the submission is closed (After 9/2/09).		
Security Requirements (if applicable):	1. Unless otherwise determined by DHR, the TO Contractor shall provide its own laptop. Contractor equipment shall meet or exceed DHR's standards for virus protection and security.		

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	<p>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.</p> <p>2. When visiting State facilities, the TO 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 Contractor-issued and State-issued security badges prominently when inside State facilities and presenting ID upon request at any time. The Contractor shall:</p> <ul 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 and such as 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 cooperate 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:<ul 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 for use on the network, state owned PCs or other equipment as necessary to diagnose and resolve incidents.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
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	<p>Contractor-supplied hardware.</p> <ol style="list-style-type: none"> 5. Dialup modem use is specifically disallowed while attached to the State network. 6. Contractor shall not install or utilize remote control or file sharing software unless explicitly approved by the State. 7. Contractor shall sign any documents that are reasonably necessary to keep the Contractor in compliance with the State IT Security Policies. <p>F. The TO 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 TO Contractor or any of its designees will be regarded as a breach of the contract and may be followed by termination for default.</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 TO Contractor. 2. Invoice payments to the TO Contractor shall be governed by the terms and conditions defined in the CATS II Master Contract. Invoices for payment shall contain the TO Contractor's Federal Employer Identification Number (FEIN), as well as the information described below, and must be submitted to the TO Manager for payment approval. 3. This procedure consists of the following requirements and steps: <ol style="list-style-type: none"> A. The invoice shall identify Department of Human Resources/Office of Technology for Human Services, labor category, associated TO Agreement number, date of invoice, period of performance covered by the invoice, and a TO Contractor point of contact with telephone number. B. The TO 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:

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	<p><u>Attention:</u> Deputy CIO of Enterprise Policy and Planning, 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 TO Agreement. In no event shall any invoice be submitted later than 60 calendar days from the TO Agreement termination date.</p>
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Section 2 – Agency Point of Contact (POC) Information

Agency / Division Name:	Department of Human Resources Office of Technology for Human Services		
Agency POC Name:	Hattie Crosby Procurement Supervisor	Agency POC Phone Number:	410-238-1339
Agency POC Email Address:	hcrosby@dhr.state.md.us	Agency POC Fax:	410-238-1260
Agency POC Mailing Address:	1100 Eastern Blvd. Baltimore, MD 21221		

Section 3 – Scope of Work

Background

DHR requires support to develop a CATS II Task Order Request for Proposals (TORFP) for the procurement, design, testing and deployment of an Enterprise Content Management solution. As part of developing the specifications and the TORFP, the Department requires staff possessing the specific technical expertise to assess the business requirements, hardware, software, and bandwidth, and storage requirements to support an enterprise-wide content management (and content sharing) solution. For the Department’s purposes, Enterprise Content Management is defined as the technologies, strategies, methods and tools used to capture, manage, store, preserve, and deliver content and documents related to an organization and its processes.

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 EPMO. This task may require the TO 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 resources for each assignment must possess exemplary communication and people skills and be skilled in facilitating all manners of project team interactions.

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Job Description/s	
Position Title/s or Service Type/s (From Section 1 Above)	Duties / Responsibilities
1. Subject Matter Expert	<ol style="list-style-type: none"> 1. The TO Contractor Subject Matter Expert's working hours shall be consistent with those of the DHR staff that they support. Regular DHR business hours are Monday through Friday, 8 AM to 5 PM, Eastern Standard Time. It is expected that when needed, the SME will work evenings, nights, weekends, holidays, and other non-standard work hours to complete the tasks outlined in this RFR. 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. During the course of the contract resulting from this RFR, communications of all types (written, verbal and both formal and informal) and interactions within and external to DHR shall be conducted with the utmost discretion. Based on the confidentiality inherent with the types of work assignments this RFR requires, the TO Contractor Subject Matter Expert shall acknowledge its understanding of this requirement and its agreement that should a breach of confidentiality occur either directly or indirectly, it is the TO Contractor's responsibility to inform the procurement officer as soon as it becomes aware of the breach. Based on severity and circumstances, the breach may be addressed through the pursuance of contractual remedies up to and including termination of the contract. 3. The TO Contractor shall be precluded from development, implementation, or hosting projects for the Maryland Department of Human Resources that result from the TO Contractor's activities under this RFR. The TO Contractor shall be precluded both as the prime and as a subcontractor. 4. In addition, certain other opportunities may result in a conflict of interest, and it shall be the responsibility of the TO Contractor to assure that no member of its staff engages 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 TO Manager learn that any member of the TO Contractor's team has failed to observe these guidelines, the offending team member shall be immediately dismissed from the engagement. 5. The SME will have secondary responsibility for

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	<p>developing the TORFP, working closely with the Technical Writer to support the development of the document.</p> <ol style="list-style-type: none"> 6. The SME and the Technical Writer will work together to determine a high-level timeline for accomplishing the research, analysis, and composition of the TORFP and deliver to DHR within ten (10) business days from start of the engagement. 7. The SME 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. 8. The SME will provide a weekly status report to the Chief Information Officer and/or her designees (content and format to be determined jointly by DHR and the SME following start of engagement). 9. In support of developing specifications for the procurement of an Enterprise Content Management system, the SME will: <ol style="list-style-type: none"> A. Coordinate and attend meetings as appropriate with Departmental staff to gather business requirements, understand needs and obtain information necessary. B. Assess the Department’s current documentation management processes and activities. C. Define high-level functional requirements for an enterprise-wide content management solution. D. Assess hardware, storage, bandwidth and software requirements and make determinations regarding the feasibility and appropriateness of alternatives. E. Identify various system interfaces and interdependencies. F. Establish system boundaries; identify goals, objectives, critical success factors, and performance measures. G. Determine if phasing the enterprise content management solution is recommended and conceptualize phasing at a high level. H. Identify assumptions and risks. I. Develop high-level technical architecture, process models, and a concept of operations. J. Support the delivery of the final TORFP by the mutually agreed-upon date.
<p>2. Technical Writer</p>	<ol style="list-style-type: none"> 1. The TO Contractor Technical Writer’s working hours shall be consistent with those of the DHR staff that they support. Regular DHR business hours are Monday through Friday, 8 AM to 5 PM, Eastern Standard Time. It is expected that when needed, the Technical Writer will work evenings, nights, weekends, holidays, and other non-standard work

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	<p>hours to complete the tasks outlined in this RFR. 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 DHR business hours to meet the needs of this RFR.</p> <ol style="list-style-type: none">2. During the course of the contract resulting from this RFR, communications of all types (written, verbal and both formal and informal) and interactions within and external to the Department of Human Resources shall be conducted with the utmost discretion. Based on the confidentiality inherent with the types of work assignments this RFR requires, the TO Contractor Technical Writer shall acknowledge its understanding of this requirement and its agreement that should a breach of confidentiality occur either directly or indirectly, it is the TO Contractor's responsibility to inform the procurement officer as soon as it becomes aware of the breach. Based on severity and circumstances, the breach may be addressed through the pursuance of contractual remedies up to and including termination of the contract.3. The TO Contractor shall be precluded from development, implementation, or hosting projects for the Maryland Department of Human Resources that result from the TO Contractor's activities under this RFR. The TO Contractor shall be precluded both as the prime and as a subcontractor. Failure to observe this requirement may result in the Department pursuing contractual remedies up to and including termination of the contract.4. In addition, certain other opportunities may result in a conflict of interest, and it shall be the responsibility of the TO Contractor to assure that no member of its staff engages 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 TO Manager learn that any member of the TO Contractor's team has failed to observe these guidelines, the offending team member shall be immediately dismissed from the engagement.5. The Technical Writer will have primary responsibility for developing the TORFP.6. The Technical Writer and the SME will work together to determine a high-level timeline for accomplishing the research, analysis, and composition of the TORFP and deliver to DHR within ten (10) business days from start of the engagement.7. The Technical Writer will deliver all documentation including draft and final versions of the TORFP as
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	<p>well as 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>8. The Technical Writer will provide a weekly status report to the Chief Information Officer and/or her designees (content and format to be determined jointly by DHR and the TW following start of engagement).</p> <p>9. In support of developing specifications for the procurement of an Enterprise Content Management system, the Technical Writer will:</p> <ul style="list-style-type: none"> A. Attend meetings as appropriate with Departmental staff to gather requirements, understand needs and obtain information necessary. B. Work with Departmental procurement staff to obtain applicable documents including templates and samples as necessary to develop the TORFP. C. Work closely with the SME to develop content and specifications for the TORFP based on the SME's assessments, notes, and interactions with Departmental staff. D. Conduct reviews of draft TORFPs with stakeholders identified by OTHS. The goal of the reviews is to assure the Department's needs, objectives, requirements and specifications have been accurately captured and articulated. Following the walk-through discussions, the Technical Writer will incorporate suggestions and changes as applicable. E. Deliver the final TORFP by the mutually agreed-upon date.
Minimum Qualifications	
Position Title/s or Service Type/s (From Section 1 Above)	Required Experience/Knowledge/Skill
1. Subject Matter Expert	<ul style="list-style-type: none"> 1. Bachelor's Degree or equivalent experience in a technical field. 2. At least five (5) years experience with Enterprise Content Management solutions. 3. At least five (5) years experience conducting feasibility studies and performing requirements definition. 4. General experience with implementations and roll-outs of content management solutions is also desired. 5. Excellent communication skills.

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2. Technical Writer	<ol style="list-style-type: none"> 1. Bachelors degree in English, technical writing, Computer Science or equivalent experience in a technical field. 2. At least (5) years technical writing experience in technical environments, developing technical documentation such as design documents, specifications, training materials, production support documents, etc. 3. Exemplary grammar and proofreading skills. 4. Excellent communication skills.
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 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 <u>must</u> submit the following documents: <ul style="list-style-type: none"> o Resume's for positions / service types as described in the RFR o MBE Forms D1 and D2 (Under 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 CATS II Master Contractor Feedback Form (See location above) o Documents listed below as required by the hiring agency 	
1. For Subject Matter Experts – no additional documentation required.	
2. For Technical Writers – a writing sample demonstrating the candidate's writing skills no longer than five (5) double-spaced pages in length.	
Section 5 – Evaluation Criteria – (Provide a list of evaluation criteria in descending order of importance)	
1. Specific work experience and relevant subject matter expertise as defined by the resume and the interview. (minimum qualifications listed in the RFR)	
3. Knowledge, skills, and training as defined by the resume and the interview and writing sample.	
4. Required submission (see Section 4)	
3. Price.	
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.	