Request for Resume (RFR)
CATS II Master Contract

All Master Contract Provisions Apply

<table>
<tr><td colspan="2">Section 1 –General Information</td></tr>
<tr><td>RFR Number:
(Reference BPO Number)</td><td>P00B1400199</td></tr>
<tr><td>Functional Area
(Enter One Only)</td><td>Functional Area 10 – IT Management & Consulting Services</td></tr>
<tr><td colspan="2">Position Title/s or Service Type/s
(Short term staff or PMP)</td></tr>
<tr><td colspan="2">1. Project Manager</td></tr>
<tr><td>Anticipated start date</td><td>February 21, 2011</td></tr>
<tr><td>Duration of assignment</td><td>12 months with the option to extend to 18 months if needed.</td></tr>
<tr><td>Designated Small Business Reserve?(SBR):
(Enter "Yes" or "No")</td><td>No</td></tr>
<tr><td>MBE goal, if applicable</td><td>0%</td></tr>
</table>

<table>
<tr><td>Issue Date:
mm/dd/yyyy</td><td rowspan="2">1/3/2011</td><td>Due Date:
mm/dd/yyyy</td><td>01/10/2011</td></tr>
<tr><td>Time (EST):
00:00 am/pm</td><td>2:00 PM</td></tr>
</table>

<table>
<tr><td>Place of Performance:</td><td>Department of Labor, Licensing and Regulation (DLLR)
1100 N Eutaw Street, Baltimore, MD 21201
Division of Unemployment Insurance</td></tr>
<tr><td>Special Instructions:
(e.g. interview information, attachments, etc.)</td><td>Interviews will be conducted by a three person panel using a standardized set of interview questions.

The TO Contractor shall be required to comply with all applicable laws, regulations, policies, standards, and guidelines affecting information technology projects, which may be created or changed periodically. The TO Contractor shall adhere to and remain abreast of current, new, and revised laws, regulations, policies, standards, and guidelines affecting project execution. The following policies, guidelines and methodologies can be found at http://doit.maryland.gov/policies/Pages/ContractPolicies.aspx under "Policies and Guidance." These may include, but are not limited to:

• The State's System Development Life Cycle (SDLC) methodology;

· The TO Contractor shall follow the project management methodologies that are consistent with the Project Management Institute's Project Management Body of Knowledge Guide. TO Contractor is to follow a consistent methodology for all TO activities.

· The State of Maryland ADA Policies and Standards</td></tr>
</table>

	(http://doit.maryland.gov (search: nva (non-visual access)
Security Requirements (if applicable):	Selected individual must pass background checks. A. Selected personnel must adhere to the State Information Technology Security Policy and Standards http://doit.maryland.gov/policies/Pages/ContractPolicies.aspx B. Selected personnel shall not connect any of its own equipment to an Agency's LAN/WAN without prior written approval by the State. C. Selected personnel shall provide and fill-out any necessary paperwork for security access to sign on at the State's site if access is needed to the State's LAN/WAN, as directed and coordinated with the POC. D. Selected Personnel shall display his or her company ID badges at all times while on State premises. Each such employee or agent upon request of State personnel shall provide additional photo identification.
Invoicing Instructions:	Invoices will be submitted with every fourth time sheet for the duration of the project. Invoices shall comply with all requirements in Section 2.8 of the CATS II Master Contract RFP.

Section 2 – Agency Point of Contact (POC) Information

Agency / Division Name:	Department of Labor, Licensing and Regulation		
Agency POC Name:	Brenda Shelton Lee, Procurement Officer	**Agency POC Phone Number:**	410-230-6027
Agency POC Email Address:	blee@dllr.state.md.us	**Agency POC Fax:**	410-333-3383
Agency POC Mailing Address:	DLLR, Office of Contracts and Procurement, 500 N. Calvert St. Room 477, Baltimore, MD 21202		

Section 3 – Scope of Work

Background

DLLR's Division of Unemployment Insurance provides benefits to persons who are unemployed through no fault of their own, and who are ready, willing and able to work, and actively seeking work. The office is located in downtown Baltimore and the work will be performed at this location.

Within the Division of Unemployment Insurance the Benefit Payment Control unit actively works to prevent, detect and recover overpayments to claimants. Overpayments can occur for a variety of reasons, including fraud and human error.

The Task Order (TO) Contractor shall provide a highly qualified Project Manager who is certified as a Project Management Professional (PMP) by the Project Management Institute (PMI). The individual provided by the selected TO Contractor shall apply Project Management Body of Knowledge (PMBOK) and State of Maryland System Development Life Cycle (SDLC) standards and methodologies to manage the Project.

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This project is funded through a grant from the US Department of Labor to upgrade Maryland's software dedicated to Benefit Payment Control (BPC) functions. The project manager will oversee the procurement and successful installation of the software. The software to be procured must be a COTS product developed exclusively for Benefit Payment Control and in use in multiple states. The selected vendor will be responsible for performing software configuration.

Job Description/s	
Position Title/s or Service Type/s (From Section 1 Above)	**Duties / Responsibilities**
1. Project Manager	· Provides project management duties as described in the State of Maryland SDLC and PMI PMBOK – Manages the project for all lifecycle phases · Responsible and accountable for project execution and closing of the Benefit Payment Control Automation project · Provides contract management oversight · See Attachment 3 for full scope of responsibilities The project manager will work with Unemployment Insurance and the BPC unit to hire a vendor with COTS software for managing and automating BPC functions. The project manager will be responsible for executing the project. Must apply PMI or other industry recognized PM methodologies in managing the project.
Selection Criteria	
Position Title/s or Service Type/s (From Section 1 Above)	**Required Experience/Knowledge/Skill**
1. Project Manager	Must be a Certified Project Management Professional (PMP) by Project Management Institute (PMI). Minimum of ten years experience in applying the PMBOK methodology to project management / leadership roles implementing complex system integration and software solutions. Familiarity with the State of Maryland's SDLC is required. Experience with a Windows, Linux application server / IBM main frame database is a plus. In addition, the individual proposed must have at least five (5) years of experience in managing IT related projects specifically and must demonstrate a leadership role in at least three successful projects that were delivered on time, on budget, and within scope.

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<table>
<tr><td colspan="1" align="center">Section 4 - Required Submissions</td></tr>
<tr><td>
NOTE:

- 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:
  - Resume for each position / service type described in the RFR (Attachment 1)
  - Price Proposal (Attachment 2)
  - Conflict of Interest Affidavit (Attachment G in the CATS II RFP)
  - Living Wage Affidavit (Attachment I in the CATS II RFP)
  - Documents listed below as required by the hiring agency
</td></tr>
<tr><td>1. Copy of PMI certificate or equivalent evidence of required training or education.</td></tr>
</table>

Section 5 – Evaluation Criteria – (Provide a list of evaluation criteria in descending order of importance)
1. Work Experience including previous experience with DLLR
2. Training and education
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. **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 # P00B1400199

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:	**Project Manager**

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

<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>			

ATTACHMENT 2

RFR PRICE PROPOSAL - PROJECT MANAGER

RFR # P00B1400199

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

Year 1		
Hourly Labor Rate	**Annual Hours**	**Year 1 Price (Labor Rate x Hours)**
$	**1,968**	$
6 Month Option		
Hourly Labor Rate	**Annual Hours**	**6 Mo. Option Price (Labor Rate x Hours)**
$	**164**	$
Total RFR Price = Sum of Year 1 + 6 Mo. Option Price:		$

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.

ATTACHMENT 3 – PROJECT MANAGEMENT ACTIVITIES

	Project Management Activities
1	Become thoroughly knowledgeable on all current Benefit Payment Control activities to function as the Benefit Payment Control Automation Project PM. Perform the role of the Benefit Payment Control Automation Project PM consistent with PMI standards and in accordance to PMBOK principles of project management and the State of Maryland Software Development Life Cycle. Define PM best practices for project and perform Benefit Payment Control Automation Project activities consistent with the 9 knowledge areas including: · *Procurement Management* consisting of COTS 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 development, and schedule control activities. · *Integration Management* consisting of project plan development, 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, budgeting and cost control activities. · *Human Resources Management* consisting of organizational planning, project team acquisition, and staff development 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	Create and maintain an ongoing Benefit Payment Control Automation Project *Project Management Plan (PMP),* which describes the PM's processes and activities for the Benefit Payment Control Automation Project and 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 Scope Management, Schedule Management, Financial Management, Quality Management, Resource Management, Communications management, Project Change Management, Risk Management, Procurement Management and others deemed necessary to manage the modernization project. In addition, the PMP defines the organization and infrastructure required to execute the Benefit Payment Control Automation Project.
3	Manage all project resources and provide overall Benefit Payment Control Automation Project management, which includes the COTS Contractor(s) and their PM who will be

	selected to configure their COTS application to current Maryland technology(s).
4	Create and maintain an ongoing Benefit Payment Control Automation Project *Integrated Master Schedule* suitable for tracking all current and pending Benefit Payment Control Automation Project's related project activities including project management activities, COTS Contractor(s) activities and agency activities. At a minimum, the master schedule shows milestones, deliverables, times of performance, degrees of completion and resources for all Benefit Payment Control Automation Project activities starting with NTPs and ending with successful configuration of COTS product with Maryland systems. Subsequent SDLC phases from detail requirements to implementation shall be added and integrated once the COTS Contractor(s) has been selected. Prior to the Master Schedule, Project Manager will develop a high level Work Breakdown Structure (WBS) for all Benefit Payment Control Automation Project implementation and SDLC phase activities.
5	Work with COTS Contractor(s) once selected to integrate their plan and methodology into the Benefit Payment Control Automation Project *Integrated Master Schedule* once the COTS Contractor(s) is selected to track project progress. Revise and maintain ongoing updates to the appropriate Benefit Payment Control Automation Project *Project Management Plan* and related project components as outlined in the State's SDLC methodology.
6	Create and maintain an ongoing Benefit Payment Control Automation Project *Communications Plan* for all project stakeholders including stakeholder contact list, distribution structure, description of information to be disseminated, schedule listing when information will be produced and method for updating the communications plan. Ensure all appropriate stakeholders have been identified and their requirements and expectations have been documented and managed within the scope of the project.
7	Develop and maintain an ongoing Benefit Payment Control Automation Project *Master Risk Management Plan (RMP)* and *Risk Registry*. The Benefit Payment Control Automation Project *Master RMP* shall identify and prioritize potential risks to successful completion of the CUBS implementation solicitation(s). The Benefit Payment Control Automation Project *Master RMP* shall identify potential risk impacts and recommended risk responses. The Benefit Payment Control Automation Project *Master RMP* shall incorporate pertinent risk information found in the Benefit Payment Control Automation Project *Master Project Status Report*. The Benefit Payment Control Automation Project *Master RMP* will be keep a *Risk Registry* of all Benefit Payment Control Automation Project risk and the *Risk Registry* will be updated throughout the project.
8	Develop documented issues escalation and resolution processes for the Benefit Payment Control Automation Project and communicate the processes with all Benefit Payment Control Automation Project stakeholder and project team members.
9	Develop a Benefit Payment Control Automation Project *Deliverable Comments Matrix (DCM) Template* for use in documenting comments and recommended changes to all deliverables from COTS Contractor(s) and Benefit Payment Control Automation Project SDLC phases prior to acceptance. The Project Manager will review and submit completed deliverable comment matrices to COTS Contractor(s) or document author and review subsequent versions of Benefit Payment Control Automation Project deliverables to ensure

	all comments and/or changes have been addressed adequately. Additionally, review contract deliverables for completeness, adherence to standards and contract requirements.
10	Develop a Benefit Payment Control Automation Project *Change Management Plan* that describes the processes for assuring that the project has adequate control over changes to all items (scope, requirements, and cost) necessary for creating or supporting the project deliverables. At a minimum, the plan should address the change management procedure, approvals process, and tools used (i.e. change request form, change order). The Change Management Plan should include: 1. Coordination with TO Manager for process to review and approval of proposed changes to the project; 2. Coordination with COTS Contractor(s) for process to review and agree on proposed changes to COTS activities and deliverables; and 3. For approved changes, perform project integration management consistent with the PMBOK.
11	Develop a Benefit Payment Control Automation Project *Quality Assurance Plan* that captures the plan to ensure that all steps of the project from procurement through the State of Maryland SDLC phases are monitored with proper acceptance criteria defined for each stage of the SDLC. The plan should also define signoff procedures for various milestones and deliverables. Additionally, the PM will provide Benefit Payment Control Automation Project deliverable Quality Assurance (QA) by evaluating and providing critical comments on all Benefit Payment Control Automation Project deliverables. QA shall be based on comparing deliverables to the detailed requirements of the Benefit Payment Control Automation Project solicitation(s) and Project Manager's industry expertise. Comments shall describe changes required for deliverable acceptance. Comments shall be documented in the Benefit Payment Control Automation Project *Deliverable Comments Matrix*.
12	Obtain comments on all Benefit Payment Control Automation Project deliverables from DLLR staff as identified by the TO Manager. Also obtain comments from key stakeholders on all SDLC deliverables and COTS Contractor(s) deliverables submitted. Compile comments in the Benefit Payment Control Automation Project *Deliverable Comments Matrix*.
13	Schedule and facilitate regular weekly Benefit Payment Control Automation Project status, risk and issue discussions with the TO Manager covering all pending and current Benefit Payment Control Automation Project activities. Status, hours worked, project financials, risk and issue dispositions for the past week, and action items for week pending, shall be captured and tracked in table format in a Benefit Payment Control Automation Project *Master Status Report*. The Benefit Payment Control Automation Project *Master Status Report* also shall have sections describing Project Management activities, updates to the Benefit Payment Control Automation Project *Integrated Master Schedule* and Benefit Payment Control Automation Project *Master RMP*. The Benefit Payment Control Automation Project *Master Status Report* shall contain a section on lessons learned from Benefit Payment Control Automation Project and any other pertinent status information.
14	Coordinate with Benefit Payment Control Automation Project COTS Contractor(s) to control Benefit Payment Control Automation Project to agreed upon Benefit Payment Control

	Automation Project *Project Management Plans*. Work with Benefit Payment Control Automation Project COTS Contractor(s) to address schedule variances. Document schedule variances in the Benefit Payment Control Automation Project *Integrated Master Schedule* and Benefit Payment Control Automation Project *Master Status Report*.
15	Collect, organize, store, and manage Benefit Payment Control Automation Project artifacts and information. This includes maintaining current and archival Benefit Payment Control Automation Project files (electronic and paper), collecting and distributing information to and from project stakeholders, entering Benefit Payment Control Automation Project updates into DLLR internal weekly status reports, Clarity, and project tracking systems, and recommending ways to optimize DLLR's project management office for the Benefit Payment Control Automation Project .
16	Function as a liaison between DLLR/ Division of Unemployment Insurance personnel, Benefit Payment Control Automation Project Stakeholders and the COTS Contractor(s).
17	Perform other minor duties related to Benefit Payment Control Automation project management support as assigned by the TO Manager. Minor duties may include responding to Benefit Payment Control Automation Project related phone calls and email, making photo copies, scheduling and attending ad hoc Benefit Payment Control Automation Project related meetings, engaging in TO performance discussions, and coordinating Benefit Payment Control Automation Project COTS Contractor(s) invoice receipt and approval.
	Procurement Activities
1	Work with Division of Unemployment Insurance and Benefit Payment Control Unit as an advisor to assist in the solicitation process including evaluation of responses to the solicitation(s), performing due diligence in review of potential COTS financials for completeness, and other duties as assigned directly related to the Benefit Payment Control Automation Project solicitation(s).
2	Participate in procurement processes to include: Providing input on Benefit Payment Control Automation Project procurement schedule and serving on evaluation committee.
3	Manage change orders in accordance with the Benefit Payment Control Automation Project *Change Management Plan*. Work with the DLLR Procurement Officer to define change order scope and cost, and impact on Benefit Payment Control Automation Project. Perform cost / benefit analyses, and provide valid justifications for change orders. Document changes orders in a *Change Order information Sheet* to be provided by the TO Manager. Coordinate the implementation of change orders with the Contract Manager and Benefit Payment Control Automation Project Contractor(s).
4	Upon COTS Contractor(s) selection and NTPs, schedule and facilitate informal "meet and greet" session with the Benefit Payment Control Automation Project Contractor(s) to discuss roles and set expectations for the Benefit Payment Control Automation Project. Document session points in the Benefit Payment Control Automation Project *Master Status Report*.
	Other SDLC Duties
1	Conduct Benefit Payment Control Automation Project Kickoff Meeting and follow-on Kick-off meeting(s) with COTS Contractor(s).

2	Schedule and facilitate bi-weekly Benefit Payment Control Automation Project status and issue discussions with COTS Contractor(s) based on project status report deliverables submitted by COTS Contractor(s). Transfer pertinent COTS Contractor(s) status and issue dispositions to the Benefit Payment Control Automation Project *Master Status Report*.
3	Prepare and submit to DoIT quarterly Benefit Payment Control Automation Project financial and status reports.
4	Make available through project team meetings required SDLC and reporting documentation and prepare summary minutes for all meetings.
5	Ensure project governance processes are documented and practiced.
6	Review and as necessary develop a written procedure for configuration control for application code promotion.
7	Perform QA tasks throughout the duration of the project to ensure the State receives a thoroughly tested and integrated COTS working system.
8	Coordinate and manage appropriate product-related training for users.
9	Work closely with Benefit Payment Control functional managers to resolve team members' workload conflicts.
10	Other duties as assigned by TO Manager for the successful implementation of the Benefit Payment Control Automation Project.

ATTACHMENT 4- DELIVERABLE PRODUCT ACCEPTANCE FORM (DPAF)
(Submit one DPAF monthly)

TO Requesting Agency: Department of Labor, Licensing and Regulation
TO Agreement Name: Benefit Payment Control Automation Project
TO Agreement #:

DOIT Contact:
TO Contractor:
TO Contractor Contact:

   The TO Contractor has submitted the deliverable described below for the above referenced TO Agreement.

Deliverable ID#	Deliverable Title	Hours	Monthly Price

The Information Below Shall Be Completed by TO Manager

DELIVERABLES AND PROJECT MANAGEMENT PERFORMANCE RATING DISPOSITION:
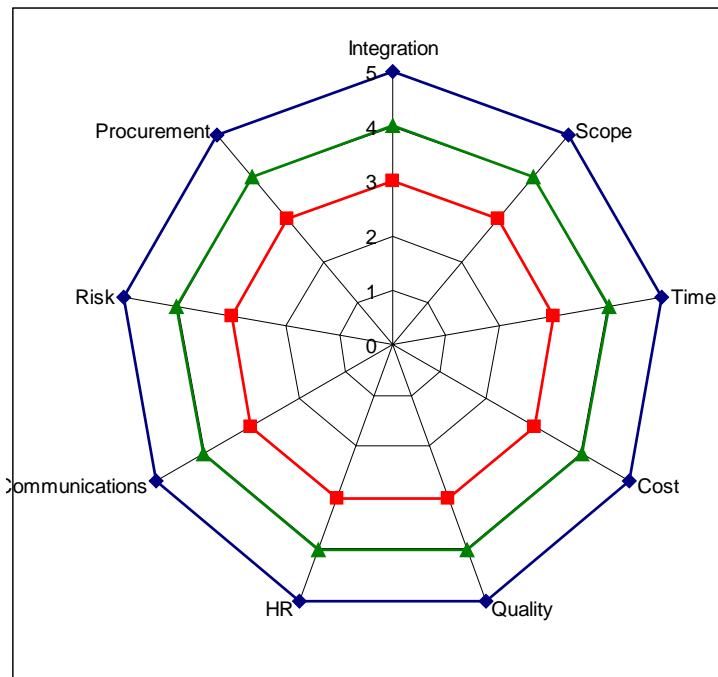
PM Processes	Rating**
Procurement Management	
Schedule Management	
Scope Management	
Cost Management	
Risk Management	
Human Resources Management	
Quality Management	
Communications Management	
Integration Management	
Total Average Score for Applicable Processes	

**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 Project Manager should take Mitigation Procedures for Poor Or Non-Performance as defined in Section 2.6.2 of TORFP.

☐   Deliverables and Project Management Processes are accepted.

☐   Deliverables and Project Management Processes are rejected (for reasons indicated below).

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

OTHER COMMENTS:

_____   _____
         TO Manager Signature   Date Signed