



Amendment #1
Task Order Request for Proposals (TORFP) 060B8400062
Oversight Program Support Services
July 20, 2018

Ladies/Gentlemen:

This Amendment #1 is being issued to amend and clarify certain information contained in the above referenced Task Order Request for Proposals (TORFP). All information contained herein is binding on all Offerors who respond to this TORFP. For the following changes/additions, any new language has been double underlined and marked in bold (i.e., **new**) and any deleted language has been marked with a strikethrough (i.e., ~~delete~~).

1. Revised Key Information Summary Sheet “TO Proposals Due (Closing) Date” as follows:

TO Proposals Due (Closing) Date and Time:	July 25, <u>August 8</u> , 2018 at 2:00 PM Local Time Offerors are reminded that a completed Feedback Form is requested if a no-bid decision is made (see Section 5.1).
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Issued by:

Memory Jackson
Procurement Officer



Amendment #2
Task Order Request for Proposals (TORFP) 060B840062
Oversight Program Support Services
July 27, 2018

Ladies/Gentlemen:

This Amendment #2 is issued to amend and clarify certain information contained in the above referenced Task Order Request for Proposals (TORFP). All information contained herein is binding on all Offerors who respond to this TORFP. For the following changes/additions, any new language has been double underlined and marked in bold (i.e., **new**) and any deleted language has been marked with a strikethrough (i.e., ~~delete~~).

1. Section 2.1.5

The selected TO Contractor and any subcontractor(s) shall not be eligible for award to a contract or task order supporting a Major Information Technology Development Project (MITDP), as defined by DoIT, for the duration of the TO Agreement.** Further, the selected TO Contractor and any subcontractor(s) shall not be eligible for award to ANY contract resulting from a solicitation that the TO Contractor personnel reviewed and/or commented on via DoIT oversight process, as required by this TORFP.

****The State carves out the following exception (“Exception”) to this policy: To the extent that the TO Contractor has a pre-existing award or contract supporting a MITDP, the TO Contractor will not be precluded from continuing to perform under such award or contract. Further, the TO Contractor is permitted to compete for future contracts or task orders supporting that same MITDP, so long as the TO Contractor was not involved in the review of the solicitation resulting in such contract or task order. The TO Contractor will not, however, be permitted to receive work orders under this TORFP to provide oversight services for that MITDP.**

This Exception only applies to up to two (2) MITDPs a TO Contractor supports. TO Contractors are required to identify in their Technical Proposal all MITDPs for which they have contracts or awards.

2. Section 4.11.5

By submitting a Conflict of Interest Affidavit and Disclosure, the Offeror shall be



construed as certifying all TO Contractor Personnel and Subcontractors are also without a conflict of interest as defined in COMAR 21.05.08.08A.

NOTE:

The selected TO Contractor and any subcontractor(s) shall not be eligible for award to a contract or task order supporting a Major Information Technology Development Project (MITDP), as defined by DoIT, for the duration of the TO Agreement.** Further, the selected TO Contractor and any subcontractor(s) shall not be eligible for award to ANY contract resulting from a solicitation that the TO Contractor personnel reviewed and/or commented on via DoIT oversight process, as required by this TORFP.

****The State carves out the following exception (“Exception”) to this policy: To the extent that the TO Contractor has a pre-existing award or contract supporting a MITDP, the TO Contractor will not be precluded from continuing to perform under such award or contract. Further, the TO Contractor is permitted to compete for future contracts or task orders supporting that same MITDP, so long as the TO Contractor was not involved in the review of the solicitation resulting in such contract or task order. The TO Contractor will not, however, be permitted to receive work orders under this TORFP to provide oversight services for that MITDP. This Exception only applies to up to two (2) MITDPs a TO Contractor supports.**

This Exception only applies to up to two (2) MITDPs a TO Contractor supports. TO Contractors are required to identify in their Technical Proposal all MITDPs for which they have contracts or awards.

3. 5.4.2(G)(2)(h)

Indicate whether the contract was/is pertaining/related/relevant to a Major Information Technology Development Project.



Amendment #3
Task Order Request for Proposals (TORFP) 060B8400062
Oversight Program Support Services
July 30, 2018

Ladies/Gentlemen:

This Amendment #3 is being issued to amend and clarify certain information contained in the above referenced Task Order Request for Proposals (TORFP). All information contained herein is binding on all Offerors who respond to this TORFP. For the following changes/additions, any new language has been double underlined and marked in bold (i.e., **new**) and any deleted language has been marked with a strikethrough (i.e., ~~delete~~).

1. Revised Key Information Summary Sheet as follows:

TO Procurement Officer:	Memory Jackson <u>Irene Mathis</u> 100 Community Place, Room 2.321 <u>Room 2.313</u> Crownsville, MD 21032
e-mail:	Memory.Jackson@maryland.gov <u>Irene.Mathis@maryland.gov</u>
Office Phone:	410-697-9678 <u>410-697-9723</u>
TO Proposals are to be sent to:	Memory.Jackson@maryland.gov <u>Irene.Mathis@maryland.gov</u>

Issued by:

Memory Jackson
Procurement Officer



Amendment #4
Task Order Request for Proposals (TORFP) 060B8400062
Oversight Program Support Services
August 3, 2018

Ladies/Gentlemen:

This Amendment #4 is being issued to amend and clarify certain information contained in the above referenced Task Order Request for Proposals (TORFP). All information contained herein is binding on all Offerors who respond to this TORFP. For the following changes/additions, any new language has been double underlined and marked in bold (i.e., **new**) and any deleted language has been marked with a strikethrough (i.e., ~~delete~~).

1. Revised Key Information Summary Sheet “TO Proposals Due (Closing) Date” as follows:

TO Proposals Due (Closing) Date and Time:	July 25, August 8, <u>August 15</u> , 2018 at 2:00 PM Local Time Offerors are reminded that a completed Feedback Form is requested if a no-bid decision is made (see Section 5.1).
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Issued by:

Irene Mathis
Procurement Officer



Amendment #5
Task Order Request for Proposals (TORFP) 060B8400062
Oversight Program Support Services
August 9, 2018

Ladies/Gentlemen:

This Amendment #1 is being issued to amend and clarify certain information contained in the above referenced Task Order Request for Proposals (TORFP). All information contained herein is binding on all Offerors who respond to this TORFP. For the following changes/additions, any new language has been double underlined and marked in bold (i.e., **new**) and any deleted language has been marked with a strikethrough (i.e., ~~delete~~).

1. Section 1.1.A Offeror Company Minimum Qualifications

- ~~A. Five (5) years of experience since 2010 supplying a team of at least three (3) IT project managers with the certification minimums, described in 1.2.1 below, to at least two (2) client organizations, one of which is a state or Federal governmental entity; and~~
- A. **Five (5) years of experience since 2010 supplying a team of at least three (3) full time equivalent IT project managers with the certification minimums, described in 1.2.1 below, to at least two (2) client organizations, one of which is a state or Federal governmental entity; and**

2. Section 2.3.1.I Performance and Personnel

- ~~I. **TO Oversight Program Manager (OPRM)** – Program Manager provided by a TO Contractor. The OPRM may be given responsibility for specific or general DoIT Oversight Program support tasks, results and/or deliverables under the TO Agreement. Such responsibility shall extend across all TO Contractor Staff tasks, results and/or deliverables under this TORFP.~~
- I. **TO Oversight Program Manager (OPRM) – Program Manager provided by a TO Contractor. The OPRM may be given responsibility for specific or general DoIT Oversight Program support tasks, results and/or deliverables under the TO Agreement. Such responsibility shall extend across all TO Contractor Staff tasks, results and/or deliverables under this TOREF. It is within the State’s discretion to direct one OPRM to oversee TO Contractor staff from both TO Contractors.**



3. Section 2.4.11.A Required Project Policies, Guidelines and Methodologies

A. ~~IV&V Sensitive Data Policy (TORFP Appendix 10)~~

A. IV&V Sensitive Data Policy (Please reference DoIT's IV&V Policy located here: <http://doit.maryland.gov/epmo/Documents/DoIT-IVV-Policy.pdf>)

4. Section 2.5.5 Deliverable Descriptions/Acceptance Criteria Chart

ID #	Deliverable Title	Acceptance Criteria	Due Date / Frequency	Note
2.4.9	Health Assessment Report	Has accurately and timely updated health assessment report in required format	Monthly/Per Project	QUAD chart
2.4.9	Portfolio Review	Has set up the portfolio review meeting, collected, and review all relevant documentation, and briefed the EPMO Manager in preparation for the review meeting	3 business days in advance of the portfolio review	
2.4.13	Develop initial Integrated Project Schedule (IPS) and maintain constant updates	Using MS Project has accurately and timely maintained the IPS demonstrating tasks, task estimates, resource assignments, and dependencies for both Agency and TO Contractor personnel.	NTP+ 30 days/then weekly	TORFP Key Personnel selected shall collaborate to create the IPS and to update it weekly. This process is subject to amendment by the TO Manager.
2.4.17 <u>2.4.7</u> &	Agency Document review	Has created a form on which it accurately and timely updated and delivered evaluation report(s) of progress/status of SDLC deliverables for assigned projects including per-	Monthly per agency per project	Includes a list of all required deliverables including ITPR Forms and the reviewers comments and acceptance



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ID #	Deliverable Title	Acceptance Criteria	Due Date / Frequency	Note
2.4.12		phase approval letters and posts them to the proper document storage location		of the documents
2.4.2 & 2.4.12	Work Orders	Has accurately and timely responded to all WO requests for work including but not limited to: on-boarding resources, document reviews, and/or any other oversight program support assignments; capturing scope, resourcing, pricing, labor categories, deliverables, etc.	As issued	NOTE: WOs may include an MBE goal
2.4.4	Status report of ongoing IV&V contractors	Has accurately and timely reported on and made recommendations on the progress of existing DoIT IAS such as IV&V contracts.	Monthly or as needed per ongoing contract	
2.4.2 & 2.4.4	IV&V Justification request	Justification is based on DoIT's IV&V policy/ IV&V selection framework	As appropriate	Has accurately assessed the need for, and expertly recommended issuance of a solicitation for an IV&V on a given agency project in need of such.
2.4.14 <u>2.4.8</u> & <u>2.4.15</u>	PEF	Has accurately documented contractor section of monthly PEF and submitted it/them to TO Manager for approval prior to monthly invoicing	Monthly	
2.4.4	Technical Business Analysis Summary and Report	Timely and accurate reports submitted to substantiate findings and/or recommendations including, but not limited to a Business Analysis Report.	As requested	Evaluate Agency business processes, procedures, and operations in conjunction with MITDP and other IT



ID #	Deliverable Title	Acceptance Criteria	Due Date / Frequency	Note
				initiatives.
2.4.5	Financial Business Analysis Report	Timely and accurate reports submitted to substantiate findings and/or recommendations including, but not limited to a Financial Analysis Report.	As requested	Evaluate Agency financial information related to MITDP and other IT initiatives.
2.4.13	Weekly status reports	Current weeks accomplishments and upcoming weeks plans documented in a status report for the TO Manager. Incorporates all WO resources in the report.	Weekly	
	Legislative reports	Developed and delivered timely reports required of DoIT by the legislature, either by Statute or in addition to any outcome of legislative sessions and so forth.	Per Statute and as requested	

5. Section 3.7.2 Security Clearance / Criminal Background Checks

~~A security clearance is not needed, but a Criminal Background Check is required for this TORFP.~~

- ~~A. Within thirty (45) days after NTP, the TO Contractor shall obtain from each individual, including subcontractor personnel, assigned to work on the Contract a signed statement permitting a criminal background check, with an annual check thereafter, to be performed at the sole expense to the TO Contractor. DoIT will obtain a criminal background check for any or all individuals using a source of its choosing. The Contract Monitor reserves the right to reject any individual based upon the results of the background check.~~

A security clearance is not needed, but a Criminal Background Check is required for this TORFP.

- A. Within thirty (30) days after NTP, the TO Contractor shall obtain from each individual, including subcontractor personnel, assigned to work on the Contract a signed statement permitting a criminal background check, with an annual check thereafter, to be performed at the sole expense to the TO Contractor. DoIT will obtain a criminal background check for any



or all individuals using a source of its choosing. The TO Manager reserves the right to reject any individual based upon the results of the background check.

6. Section 5.3.4 (A)

Two Part Formatting:

A. TO Technical Proposal shall consist of:

- ~~1) TO Technical Proposal and all supporting material in Microsoft Word format, version 2007 or greater;~~
- ~~2) The TO Technical Proposal in searchable Adobe PDF format;~~
- ~~3) A searchable Adobe copy of the TO Technical Proposal;~~
- ~~4) A second searchable Adobe copy of the TO Technical Proposal, redacted in accordance with confidential and/or proprietary information removed (see **Section 5.4.2.I, Confidentiality**).~~

Two Part Formatting:

A. TO Technical Proposal shall consist of:

- 1) TO Technical Proposal and all supporting material in Microsoft Word format, version 2007 or greater;
- 2) The TO Technical Proposal in searchable Adobe PDF format;
- 3) A second searchable Adobe copy of the TO Technical Proposal, redacted in accordance with confidential and/or proprietary information removed (see **Section 5.4.2.I, Confidentiality**).

7. Section 5.3.4 (B)

B. TO Financial Proposal shall consist of:

- ~~1) TO Financial Proposal and all supporting material in Microsoft Excel format;~~
- ~~2) The TO Financial Proposal in searchable Adobe PDF format;~~
- ~~3) A searchable Adobe copy and an Excel copy of the TO Financial Proposal;~~
- ~~4) A second searchable Adobe copy of the TO Financial Proposal, redacted in accordance with confidential and/or proprietary information removed (see **Section 5.4.2.I**).~~

B. TO Financial Proposal shall consist of:



- 1) **TO Financial Proposal and all supporting material in Microsoft Excel format;**
- 2) **The TO Financial Proposal in searchable Adobe PDF format;**
- 3) **A second searchable Adobe copy of the TO Financial Proposal, redacted in accordance with confidential and/or proprietary information removed (see Section 5.4.2.I).**

8. Section 5.4.2

The TO Technical Proposal shall include the following documents and information in the order specified as follows:

A. Proposed Services:

- 1) ~~Executive Summary: A one page summary describing the Offeror's understanding of the TORFP scope of work (Sections 2 and 3) and proposed solution.~~
- 2) ~~Proposed Solution: A more detailed description of the Offeror's understanding of the TORFP scope of work, proposed methodology and solution. The proposed solution shall be organized to exactly match the requirements outlined in Sections 2 and 3.~~
- 3) ~~Assumptions: A description of any assumptions formed by the Offeror in developing the TO Technical Proposal.~~
- 4) ~~Tools the Master Contractor owns and proposes for use to meet any tasks and requirements in Sections 2 and 3.~~

B. Proposer Information Sheet and Transmittal Letter

~~The Offeror Information Sheet (see Appendix 2) and a Transmittal Letter shall accompany the TO Technical Proposal. The purpose of the Transmittal Letter is to transmit the TO Proposal and acknowledge the receipt of any addenda to this TORFP issued before the TO Proposal due date and time. Transmittal Letter should be brief, be signed by an individual who is authorized to commit the Offeror to its TO Proposal and the requirements as stated in this TORFP, and contain acknowledgement of all addenda to this TORFP issued before the TO Proposal due date.~~

C. Minimum Qualifications Documentation

~~The Offeror shall submit any Minimum Qualifications documentation that may be required, as set forth in TORFP Section 1.~~

The TO Technical Proposal shall include the following documents and information in the order specified as follows:

A. Proposer Information Sheet and Transmittal Letter



The Offeror Information Sheet (see Appendix 2) and a Transmittal Letter shall accompany the TO Technical Proposal. The purpose of the Transmittal Letter is to transmit the TO Proposal and acknowledge the receipt of any addenda to this TORFP issued before the TO Proposal due date and time. Transmittal Letter should be brief, be signed by an individual who is authorized to commit the Offeror to its TO Proposal and the requirements as stated in this TORFP, and contain acknowledgement of all addenda to this TORFP issued before the TO Proposal due date.

B. Proposed Services:

- 1) **Executive Summary: A one-page summary describing the Offeror’s understanding of the TORFP scope of work (Sections 2 and 3) and proposed solution.**
- 2) **Proposed Solution: A more detailed description of the Offeror’s understanding of the TORFP scope of work, proposed methodology and solution. The proposed solution shall be organized to exactly match the requirements outlined in Sections 2 and 3.**
- 3) **Assumptions: A description of any assumptions formed by the Offeror in developing the TO Technical Proposal.**
- 4) **Tools the Master Contractor owns and proposes for use to meet any tasks and requirements in Sections 2 and 3.**

C. Minimum Qualifications Documentation

The Offeror shall submit any Minimum Qualifications documentation that may be required, as set forth in TORFP Section 1.1

9. Section 7 TORFP ATTACHMENTS AND APPENDICES

Table 1: TORFP ATTACHMENTS AND APPENDICES

Applies?	When to Submit	Label	Attachment Name
Y	Before TO Proposal	A	Pre-Proposal Conference Response Form
Y	With TO Proposal (Volume II)	B	TO Financial Proposal Instructions and Form
N	N/A	C	RESERVED
Y	With TO Proposal	D	MBE Forms D-TORFP,
Y	With WO	D	D-1A
Y	10 Business Days after recommended award	D	D-2, D-3A, D-3B Important: Attachment D-1C, if a waiver has been requested, is also required within 10 days of recommended award.



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 Secretary
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 Deputy Secretary

Applies?	When to Submit	Label	Attachment Name
Y	As directed in forms	D	MBE Forms D-4A, D-4B, D-5
N	N/A	E	Veteran Owned Small Business Enterprise (VSBE) Form E-1
N	N/A	E	VSBE Forms E-1B, E-2, E-3 Important: Attachment E-1B, if a waiver has been requested, is also required within 10 days of recommended award.
Y	With TO Proposal	F	Maryland Living Wage Requirements for Service Task Orders and Affidavit of Agreement
N	N/A	G	Federal Funds Attachments
Y	With TO Proposal	H	Conflict of Interest Affidavit and Disclosure
Y	NLT 5 Business Days after recommended award	I	Non-Disclosure Agreement (Can be included with Volume I)
N	N/A	J	HIPAA Business Associate Agreement
N	N/A	K	Mercury Affidavit
Y	With TO Proposal	L	Location of the Performance of Services Disclosure
Y	5 Business Days after recommended award	M	Task Order Agreement
N	N/A	N	RESERVED
N	N/A	O	RESERVED
Y	With Proposal	P	Certification Regarding Investment in Iran
Appendices			
Applies?	When to Submit	Label	Attachment Name
Y	N/A	1	Abbreviations and Definitions
Y	With TO Proposal	2	Offeror Information Sheet
Y	45 days after NTP	3	Criminal Background Check Affidavit
Y	N/A	4	Sample Work Order
Y	With TO Proposal	5	Sample Work Order Resume Summary
Y	With WO Response	6	Sample Work Order Price Proposal



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Applies?	When to Submit	Label	Attachment Name
Y	N/A	7	Sample Work Order Agreement
N	N/A	8	Not used
N	N/A	9	Non-Disclosure Agreement (Offeror)
Additional Submissions			
Y	With deliverables	—	Deliverable Product Acceptance Form (DPAF) (see online at http://doit.maryland.gov/contracts/Documents/CATSPlus/CATS+DPAFSample.pdf)

Table 2: TORFP ATTACHMENTS AND APPENDICES

Applies?	When to Submit	Label	Attachment Name
Y	Before TO Proposal	A	Pre-Proposal Conference Response Form
Y	With TO Proposal (Volume II)	B	TO Financial Proposal Instructions and Form
N	N/A	C	RESERVED
Y	With TO Proposal	D	MBE Forms D-TORFP,
Y	With WO Proposal	D	D-1A
Y	10 Business Days after recommended award	D	D-2, D-3A, D-3B Important: Attachment D-1C, if a waiver has been requested, is also required within 10 days of recommended award.
Y	As directed in forms	D	MBE Forms D-4A, D-4B, D-5
N	N/A	E	Veteran-Owned Small Business Enterprise (VSBE) Form E-1
N	N/A	E	VSBE Forms E-1B, E-2, E-3 Important: Attachment E-1B, if a waiver has been requested, is also required within 10 days of recommended award.
Y	With TO Proposal	F	Maryland Living Wage Requirements for Service Task Orders and Affidavit of Agreement



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Applies?	When to Submit	Label	Attachment Name
N	N/A	G	Federal Funds Attachments
Y	With TO Proposal	H	Conflict of Interest Affidavit and Disclosure
Y	NLT 5 Business Days after recommended award	I	Non-Disclosure Agreement (Can be included with Volume I)
N	N/A	J	HIPAA Business Associate Agreement
N	N/A	K	Mercury Affidavit
Y	With TO Proposal	L	Location of the Performance of Services Disclosure
Y	5 Business Days after recommended award	M	Task Order Agreement
N	N/A	N	RESERVED
N	N/A	O	RESERVED
Y	With Proposal	P	Certification Regarding Investment in Iran
Appendices			
Applies?	When to Submit	Label	Attachment Name
Y	N/A	1	Abbreviations and Definitions
Y	With TO Proposal	2	Offeror Information Sheet
Y	<u>30 days</u> after NTP	3	Criminal Background Check Affidavit
Y	N/A	4	Sample Work Order
Y	With TO Proposal	5	Sample Work Order Resume Summary
Y	With WO Response	6	Sample Work Order Price Proposal
Y	N/A	7	Sample Work Order Agreement
N	<u>With WO Response</u>	8	Not used- <u>Performance Evaluation Form</u>
N	N/A	9	Non-Disclosure Agreement (Offeror)- <u>Reserved</u>
<u>N</u>	<u>N/A</u>	<u>10</u>	<u>Reserved</u>
<u>N</u>	<u>N/A</u>	<u>11</u>	<u>Exhibit A</u>
Additional Submissions			



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Applies?	When to Submit	Label	Attachment Name
Y	With deliverables	--	Deliverable Product Acceptance Form (DPAF) (see online at http://doit.maryland.gov/contracts/Documents/CATSPlus/CATS+DPAFSample.pdf)

10. Appendix 10. – IV&V Sensitive Data Policy



Appendix 10. – IV&V Sensitive Data Policy

Scope

This policy covers DoIT's policy for the storage and transmission of all IV&V sensitive data, regardless of the medium.

Purpose

The purpose of this policy is to provide all Maryland Agencies, IV&V Contractor(s), and any personnel involved in an IV&V project with the assurance that information gathered and opinions developed on the health of the project undergoing an IV&V are safely held and securely transmitted throughout IV&V project activities as defined by DoIT. It provides DoIT, Agency and IV&V Contractor personnel with the standards for handling of IV&V sensitive data including findings and recommendation data.

Definition

- **Confidential Information:** Non-public information that if disclosed could result in a high negative impact to the State of Maryland, its' employees or citizens and may include information or records deemed as Private, Privileged or Sensitive.
- **Project identifiable information (PII):** Used in DoIT's IV&V methodology to refer to information that can be used to uniquely identify or connect to a single project or can be used with other sources to uniquely identify a single project. The information may include individual or combination of data elements including: Contract Number, Task Order number, Purchase Order, Project Name, Project Acronym, Agency, Project Start and End Dates, Project Manager or Team members, and project code.
- **IV&V Sensitive data:** IV&V sensitive data is defined as confidential information and includes all electronic or paper document forms related to the IV&V findings and recommendations. It includes the draft findings report, final findings report, internal presentation, agency presentation materials, and derivatives of these artifacts which contain project identifiable information.

Policies & Procedures:

Watermarking

All IV&V sensitive data is confidential information and shall be clearly marked as "Confidential". This is to include findings report (draft & final), presentations (internal & Agency), or derivatives of these artifacts which contain specific project identifiable information for a particular IV&V.

Access to IV&V sensitive data

Only those Agency, IV&V Contractor, and DoIT personnel with explicit need to know and other individuals for whom an authorized Maryland State official has determined there is a mission-essential need to share and the individual has signed a non-disclosure agreement will have access to IV&V sensitive data.

Physical access controls must be in place for access to IV&V sensitive data. Physical access controls may depend on DoIT, Agency, and IV&V Contractor's individual facilities. They would include:

- Data Centers;



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- Areas containing servers and associated media;
- Networking cabinets and wiring closets; and
- Operations and control areas.

Access to data centers and secured areas where IV&V sensitive data is stored will be granted for those employees, contractors, technicians and vendors who have legitimate business responsibilities on the IV&V. Authorization should be:

- Based on frequency of need for access;
- Approved by the manager responsible for the IV&V at the respective organization. The IV&V TO Manager must be informed of all personnel granted access.

Each individual having access to IV&V sensitive data is responsible for:

- Ensuring that all portable storage media such as hard drives, flash media drives, diskettes, magnetic tapes, laptops, PDA devices, DVDs and CDs are physically secured;
- Ensuring proper environmental and physical controls are established to prevent accidental or unintentional loss of IV&V sensitive data residing on IT systems;
- Ensuring that any physical access controls are auditable.

Distribution within IV&V Project Team

The IV&V TO Manager will manage, and directly deliver controlled and tracked paper copies of IV&V sensitive documents which are stamped Confidential. Electronic file transmission method of IV&V sensitive data via email is strictly prohibited. All electronic file transmission methods must be secure and encrypted. Examples include a secure site with password protection and access restriction to electronic files for individuals authorized to access IV&V sensitive data.

All request for paper or electronic files must be requested through the IV&V TO Manager and approved prior to granting of access to paper or electronic file.

Storage

Physically controlled access to and securely stored information system media, both paper and digital, based on the "Confidential" classification of the information recorded on the media. Storage is prohibited on portable devices unless prior written approval from IV&V TO Manager has been granted. Approved storage on portable devices must be encrypted; kept from view by unauthorized individuals; protect against viewing while in use and when unattended, store in locked desks, cabinets, or offices within a physically secured building.

Redacted IV&V sensitive data

For training and lessons learned purposes only, IV&V sensitive data may be redacted and all project identifiable information removed from paper and electronic copies. All requests to create redacted IV&V sensitive data for paper or electronic copies must be made to the IV&V TO Manager and approved prior to redaction. A copy of the final versions of the redacted information will be provided to the IV&V TO Manager for review and approval.



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Questions about this policy

If you have questions about this policy, please contact the IV&V TO Manager at tma@doit.state.md.us.

Policy adherence

Failure to follow this policy can result in disciplinary action including, but not limited to, termination of IV&V contract.

~~I EXPRESSLY ACKNOWLEDGE THAT I HAVE READ THIS POLICY AND UNDERSTAND THE POLICIES, PROCEDURES, OBLIGATIONS, AND CONDITIONS SET FORTH HEREIN. BY SIGNING, I EXPRESSLY CONSENT TO BE BOUND BY DOIT'S IV&V SENSITIVE DATA POLICY SET FORTH.~~

TO Contractor/TO Contractor's Personnel

Signature: _____ Name: _____

Title: _____

Date: _____



Department Of
INFORMATION
TECHNOLOGY

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Deputy Secretary

Appendix 10. - Reserved

11. Attachment B TO Financial Proposal Price Sheet- Revised 8-9-18



Attachment B TO
Financial Proposal P

LABOR CATEGORY PERSONNEL WORK ORDER RESUME SUMMARY				
Proposed Individual:	Master Contractor:		CATS+ Labor Category:	
Education:	Institution/Address		Degree or Certification	Dates
Generalized Experience:	Start	End	Company/Job Title	Relevant Work Experience
Specialized Experience:	Start	End	Company/Job Title	Relevant Work Experience
TORFP Additional Requirements	Start	End	Company/Job Title	Relevant Work Experience

Provide dates in the format of MM/YY to MM/YY

The information provided on this form for this labor category is true and correct to the best of my knowledge: |

TO Contractor Representative:

Proposed Individual:

Print Name :

Print Name :

Signature:

Signature:

Date:

Date:

References

List persons the State may contact as employment references

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

INSTRUCTIONS:

1. For each Key Personnel proposed, complete one Labor Category Personnel Resume Summary form. Additional information may be attached to each Labor Category Personnel Resume Summary form that may assist a full and complete understanding of the individual being proposed.
2. For this TORFP,
 - A. Master Contractors shall comply with all personnel requirements defined under the Master Contract RFP 060B2490023.
 - B. Master Contractors shall propose **the CATS+ Labor Category that best fits each proposed Key resource**. A Master Contractor may only propose against labor categories in the Master Contractor's CATS+ Master Contract Financial Proposal.
 - C. A Master Contractor's entire TO Technical Proposal will be deemed not susceptible for award if any of the following occurs:
 - 1) Failure to follow these instructions.
 - 2) Failure to propose a resource for each job title or labor category identified in the TORFP as a required submission.
 - 3) Failure of any proposed resource to meet minimum requirements as listed in this TORFP and in the CATS+ Master Contract.

LABOR CLASSIFICATION PERSONNEL RESUME SUMMARY				
Proposed Individual:		Master Contractor:		CATS+ Labor Category:
Education:		Institution/Address	Degree or Certification	Dates
Generalized Experience:		Start	End	Company/Job Title
Specialized Experience:		Start	End	Company/Job Title
TORFP Additional Requirements		Start	End	Company/Job Title
Provide dates in the format of MM/YY to MM/YY				

Insert (respectively) the *Generalized* and *Specialized* experience description from the CATS+ RFP from Section 2.10 for the applicable labor category.

Insert the minimum qualifications and required certifications as defined in Section 2.1 of this TORFP.

Name of company and position held where proposed resource gained relevant experience