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Amendment #1
TORFP IT MANAGEMENT CONSULTING SERVICES
#E00B6400091
November 9, 2016

Ladies/Gentlemen:

This Amendment #1 is being issued to amend and clarify certain information contained in the above referenced TORFP. All information contained herein is binding on all Offerors who respond to this TORFP. Specific parts of the TORFP have been amended.

Key Information Summary Sheet

*The questions due date and time is revised to **November 21, 2016 at 5:00 PM EST.***

*The closing due date and time is revised to **November 30, 2016 at 2:00 PM EST.***

Table of Contents

The Table of Contents is updated to reflect page and heading changes as a result of these November 9, 2016 amendments.

Section 2.1.1 OFFEROR'S COMPANY MINIMUM QUALIFICATIONS

Offeror Company minimum qualifications have been amended as follows:

The Master Contractor's TO Proposal shall demonstrate meeting the following minimum requirements:

- A. At least five (5) years of experience within the last ten (10) years as a contractor providing IT management consulting and/or project management services for at least three (3) IT projects, at least one (1) of which must have been a multi-phased implementation with a cost in excess of \$10M. Engagements shall clearly outline starting and ending dates for each applicable project.

This amendment reduces from three (3) to one (1) the number of IT projects which must have been a multi-phased implementation with a cost in excess of \$10M for this minimum qualification.

- B. At least three (3) years of experience as a contractor on one (1) or more contracts providing technical architecture, strategy, and integration for multiple inter-related applications. Engagements shall clearly outline starting and ending dates for each applicable project.

This amendment reduces the required years of experience from five (5) to three (3) for this minimum qualification.

- C. At least one individual proposed shall have at least three (3) years of experience performing the following tasks in at least one (1) IT project:
- a. Creating and updating SDLC documentation; and
 - b. Managing the collection, documentation, and revisions of functional and technical requirements throughout the project lifecycle.
- A subcontractor may be used to meet this requirement.

This amendment reduces the required years of experience from five (5) to three for (3) for this minimum qualification.

This amendment removes the previously required minimum qualification 2.1.1D: At least one individual proposed shall have leadership experience participating in the evaluation and award of two (2) or more procurement proposals within the last eight (8) years with at least one of a size greater than \$15M. A subcontractor may be used to meet this requirement. A modified version of this item has been moved to TO Contractor preferred qualifications. See Section 2.2.1C.

- D. The TO Contractor's proposed Project Manager shall hold a current Project Management Professional (PMP) certification from the Project Management Institute. A subcontractor may be used to meet this requirement.

This amendment changes this minimum qualification from 2.2.1E to 2.2.1D.

Section 2.2.1 TO Contractor Preferred Qualifications

Offeror Company preferred qualifications have been amended as follows:

An Offeror may be evaluated higher for its experience, capability, and references if it meets or exceeds the preferred qualifications, listed below:

- A. Demonstrated experience furnishing all necessary services required to successfully complete all tasks and work requirements and producing high quality deliverables described herein on contracts of similar scope for at least five (5) years.

There is no change to this preferred qualification.

- B. Demonstrated experience in successfully planning, managing, and executing one (1) or more projects of a size and scope comparable to that contained herein in a tax processing and collection environment for a U.S. federal, state, or local government unit within the last seven (7) years.

There is no change to this preferred qualification.

- C. **At least one individual proposed shall have leadership experience participating in the evaluation and award of two (2) or more procurement proposals within the last eight (8) years with at least one of a size greater than \$10M. A subcontractor may be used to meet this requirement.**

This is a new preferred qualification for the TO Contractor.

- D. **At least five (5) years of experience as a contractor on one (1) or more contracts providing technical architecture, strategy, and integration for multiple inter-related applications. Engagements shall clearly outline starting and ending dates for each applicable project.**

This is a new preferred qualification for the TO Contractor.

- E. **At least one individual proposed shall have at least five (5) years of experience performing the following tasks in at least one (1) IT project:**
a. **Creating and updating SDLC documentation; and**
b. **Managing the collection, documentation, and revisions of functional and technical requirements throughout the project lifecycle.**
A subcontractor may be used to meet this requirement.

This is a new preferred qualification for the TO Contractor.

- F. Demonstrated experience in integrating legacy mainframe systems with a distributed COTS solution.

There is no change to this preferred qualification other than the labeling, which changed this item from C to F.

- G. In-house expertise or evidence that the TO Contractor has fostered strategic alliances with other firms that have provided organizational change management services for at least three (3) years.

There is no change to this preferred qualification other than the labeling, which changed this item from D to G.

- H. Demonstrate in its proposal that the TO Contractor has developed a strategic approach for furnishing all necessary services required to successfully complete all tasks and work requirements and producing all deliverables described herein.

There is no change to this preferred qualification other than the labeling, which changed this item from E to H.

- I. Demonstrated experience in managing one (1) or more projects using agile methodologies.

There is no change to this preferred qualification other than the labeling, which changed this item from F to I.

- J. Demonstrated experience architecting integration solutions between disparate technology platforms (e.g., mainframe systems, AS400, modern distributed systems) in various levels of maturity. Mainframe to a modern distributed environment has a higher preference.

There is no change to this preferred qualification other than the labeling, which changed this item from G to J.

- K. Demonstrated experience drafting, coordinating, and evaluating public (e.g., federal, state, local) procurements.

There is no change to this preferred qualification other than the labeling, which changed this item from H to K.

- L. Demonstrated experience drafting, coordinating, and evaluating procurements for the selection and implementation of COTS products.

There is no change to this preferred qualification other than the labeling, which changed this item from I to L.

Section 2.2.2 Project Manager (CATS+ Labor Category: Project Manager)

An extra space was deleted in item B1.

Section 2.2.3 Project Management Assistant (Master Contractor to select the CATS+ Labor Category)

An extra space and an extra semi-colon were deleted in item F1.

Section 3.14 Security Requirements

Information technology security requirements 3.14.1.2, 3.14.1.3, and 3.14.1.4 were amended as follows:

The previous 3.14.1.2 was deleted as duplicative.

The new 3.14.1.2 (previously 3.14.1.3) is now: The TO Contractor shall ensure Sensitive Data is not processed, transferred, or stored outside of the United States.

The new 3.14.1.3 (previously 3.14.1.4) is now: The Contractor shall ensure TO Contractor's Personnel shall not connect any of its own equipment to a State LAN/WAN without prior written approval by the State, which may be revoked at any time for any reason. The TO Contractor shall complete any necessary paperwork as directed and coordinated with the TO Manager to obtain approval by the State to connect TO Contractor-owned equipment to a State LAN/WAN.

Section 4.4.1 TO Technical Proposal Format

The following clarification regarding references was added to Section 4.4.1B: References provided as evidence of compliance with minimum requirements may also, at Offeror's discretion, be used to satisfy Section 4.4.1G Master Contractor and Subcontractor Experience and Capabilities.

The table in 4.4.1B was modified to reflect the changes to Offeror Company minimum qualifications described above as amendments to Section 2.1.1.

The following note of clarification regarding references was added to Section 4.4.1G:

Note: If you are providing the same references here as previously provided as evidence of compliance with minimum requirements in Section 4.4.1B, be sure to address all additional items listed in this section.

In view of the extension of the closing date for CATS+ TORFP #E00B6400091, the COM is amending it answer to one of the questions proposed.

QUESTION:

What is the target start date for resources proposed under this agreement to begin working at the COM's offices under this Task Order?

ORIGINAL RESPONSE: The target start date for key personnel proposed under this agreement to begin working at the COM's offices under this Task Order is January 9, 2017.

AMENDED RESPONSE: The target start date for key personnel proposed under this agreement to begin working at the COM's offices under Task Order is January 30, 2017.

Issued by

Michael E. Balderson
TO Procurement Officer