IT Management Consulting Services TORFP

CATS + TORFP # E00B6400091

Comptroller of Maryland (COM)

80 Calvert Street, Assembly Room

Annapolis, MD 21401

October 4, 2016 9:00 AM

I. Welcome and Introduction..Mike Balderson, Procurement Officer
   a. Attendees affiliated with Comptroller
   b. TORFP Overview.................................Debora Gorman, Assistant Director
II. General Procurement Information & Key Dates..................Mike Balderson, Procurement Officer
III. Scope of Work.. Debora Gorman, Assistant Director
IV. MBE/VSBE Goal..Bernice Jeffries, Procurement Specialist II
V. How To Submit A Proposal..Mike Balderson, Procurement Officer
VI. How Your Proposal Will Be Evaluated...........................Mike Balderson, Procurement Officer
VII. Questions and Answers Period ....ALL

We will attempt to answer every question, but our responses may be subject to clarification later. Moreover, the responses given verbally today by COM representatives are not binding upon the COM and are for informational purposes only. Questions for which you desire a firm answer should be submitted via email. All such questions will be answered by the COM, time permitting (before proposal due date). The resultant questions and answers (Q&A's) will be distributed, at no charge, via email). Q&A's will also be posted on the DoIT CATS Plus website. Also, should issues be raised which cause the solicitation to be amended, a copy of the addenda/ amendment will be posted on DoIT CATS Plus website.

I. Closing Remarks.. Mike Balderson, Procurement Officer

Meeting Summary

Meeting Title IT MANAGEMENT CONSULTING SERVICES TORFP
E00B6400091 Pre-Proposal Conference

Date/Time 10/04/2016 @ 9:00 AM – 12:00 PM

Location 80 Calvert Street, Annapolis, 21401 – Assembly Room

Participants

COM Participants	Org	Role
Debora Gorman	COM	Assistant Director Compliance Division
Penny Wires	COM	Technical Supervisor Compliance Division
Bernice Jeffries	COM	Procurement Analyst II
Mike Balderson	COM	IT Procurement Manager
Master Contractor Participants		**See Attachment.**

Objective: To engage potential Master Contractors to the IT MANAGEMENT CONSULTING SERVICES TORFP by providing information and guidance on the TORFP requirements. In addition, the forum provides an opportunity to have a dialogue with the business community regarding the Comptroller's intentions for the Compass project.

Resultant Action Items:

- Send questions to ITprocurement@comp.state.md.us by Thursday, October 6, 2016 at 5:00 PM Local Time. **(Master Contractor Participants)**
- Publish the Pre-Proposal Conference Summary and Attendee List on DoIT CATS PLUS website and email to participants. **(M. Balderson)**

Agenda & Discussion Summary

1. **Welcome – M Balderson**
   a. Mr. Balderson welcomed attendees and thanked them for participating in this Pre-Proposal Conference.
      i. The COM is sensitive to the consideration that vendors will be making bid/no bid decisions. The COM scheduled both the Pre-Proposal Conference and the deadline to receive questions early to provide the vendor community with as much information as possible to make their bid/no-bid decisions.
      ii. DoIT CATS PLUS website will have a published summary of the meeting, and will serve as the primary location for procurement information and updates.
      iii. Mr. Balderson will use the information provided on the sign-in sheet if it is necessary to contact today's attendees.
   b. Debora Gorman welcomed the attendees and provided background and context for why Compass project support is needed. COM is committed to this initiative and thanks the

vendor community for their attendance. Ms. Gorman closed by stating that the COM looks forward to receiving the audience's proposals.

2. **General Procurement Information and Key Dates – M. Balderson:**
   a. The TORFP *Key Information Summary Sheet* on Page 2 includes key dates, times and points of contact for this procurement.
      i. The deadline to submit questions is 10/6/2016 at 5:00 PM Local Time.
      ii. The COM tentatively plans to submit one set of responses to questions no later than 10/11/2016.
      iii. The Proposal Due Date is 10/13/2016 at 5:00 PM Local Time. Proposals must be received by that date and time due. If delivery of your proposal is late by one (1) minute, COM law/regulations will prevent the COM from accepting it.
3. **MBE/VSBE Goals – B. Jeffries**
   a. This solicitation has a fifteen (15) % MBE Subcontracting Goal and a one (1) % VSBE Subcontracting Goal.
4. **How to Submit a Proposal – M. Balderson**
   a. For Volume I – Technical Proposal, follow Section 4.1 to ensure completeness of your proposal and compliance to format requirements. It is important that the submittals follow the exact order requested to ensure the COM receives a response to all required elements and to facilitate evaluation. For Volume II- Financial Proposal, the Price Sheet (Attachment F) must be completely filled out. Do not enter any asterisks, notes, or conditions on the values entered.
   b. Instructions for the proposal format and submittal begin on TORFP Page 58.
      i. The COM will not accept email or fax delivery of proposals. Section 4.2.1.4 lists the acceptable delivery options.
      ii. Delivery must be provided by the due date and time.
      iii. The Technical and Financial Proposals must be sealed separately, marked and packaged in accordance with the instructions in Section 4.4. Inappropriately marking or packaging the proposal volumes can disrupt evaluation process.
5. **How Your Proposal Will Be Evaluated – M. Balderson**
   a. **Executive Summary:** Include the name, phone number, and email information for the contact to be used by the COM for follow up purposes. Also keep company profile information toward the beginning of the proposal.
   b. **References:** Think carefully about your references and reach out to them ahead of time to let them know the COM will be calling them. Ensure your reference point of contact is someone who knows the day-to-day performance attributes of your company during the course of your contract. Ensure that your reference points of contact are accessible for the COM's follow up.
   c. The **Evaluation Criteria (TORFP Page 66)** listed in Section 5.2 are presented in descending order of importance. The evaluation process includes several gates.
      i. **Responsiveness:** The COM will review the proposal for responsiveness (e.g., delivered on time; follows the format; complies with packaging requirements; names MBE and VSBE subcontractors; identifies what part of the goal they will meet; indicates if they are certified Maryland MBE).
      ii. **Compliance with Minimum Qualifications (TORFP Page 17)**

1. For the Company, compliance is a Pass/Fail judgement. The COM will use reference feedback to ensure that the Offeror's experience is real.
2. For the Solution, the Offeror will certify/assert the capabilities of your solution.

iii. **Technical and Financial Proposal Reviews**

1. The COM will review the proposal and do a qualitative analysis of the technical solution. The COM will look for strengths and weaknesses. The Offeror's Technical Proposal will be ranked based on the technical solution. The Offeror with the best technical approach and solution will be ranked most favorably.
2. Once the technical review is complete, a financial review will be performed. Note that the Financial Proposal will not be opened until this point. Vendors are reminded that no pricing information should be included in the Technical Volume or any oral presentation materials.
3. The COM may, but does not always, request a best and final offer (BAFO) affecting either or both of the technical and financial reviews. It is important that your initial submission be your best effort.
4. The Financial Proposal will also be ranked. The lowest price, details included in the Financial Proposal, and total cost of ownership all contribute to the Financial Proposal ranking.
5. Technical and financial proposal rankings will both be taken into account for the final ranking. The COM will award based on the most advantageous offer. The award may not necessarily be given to the lowest bid. Technical characteristics will heavily influence the outcome, but price will also factor in significantly.

6. **Scope of Work Overview – D. Gorman**

The COM is issuing this CATS+ TORFP to obtain IT management consulting services in accordance with the scope of work described in this Section 3. The Master Contractor will assist the COM in managing the Compass project, including coordination of COM resources and oversight of the Compass project's Implementation Contractor (IC) throughout the course of the implementation and into the maintenance phase of the project. Additional work and/or resources may be requested during the course of the TO period of performance to support additional Compass project needs.

COM intends to award this Task Order to one (1) Master Contractor that can best satisfy the TO requirements.

7. **Questions & Answers (All): Please send your questions in writing so you also have formal answer. Only formal responses should be relied upon for future clarification.**
   a. Attendees were encouraged to submit questions in writing to Mike Balderson so that the COM could respond through a Question and Answer document.
   b. Questions that were asked during the pre-proposal conference will be paraphrased in the Question and Answer document and published on the CATS+ website.
8. **Wrap Up**

a. Please remember, the proposal is due no later than 10/13/2016 at 5:00 PM local time. All required documents must be included and signed where indicated.
b. Email ITprocurement@comp.state.md.us only with your questions. Only written questions will receive an official response.
c. On behalf of the Comptroller of Maryland thank you for attending today's session.

PRE-PROPOSAL CONFERENCE

IT Management Consulting Services TORFP- # E00B6400091

Tuesday, October 4 2016, 9:00 a.m.

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GANTECH

LISTEN | INNOVATE | DELIVER

Jay Walker, PMP
Technology Services Executive

GANTECH Inc.
9175 Guilford Rd.
Suite 101
Columbia, MD 21046

443.276.4789
443.276.4777
240.381.7564
jwalker@gantech.net

Email

MDOT Certified MBE: Yes X No ______

Name

Company

Address

Telephone

IT Consulting Services

SBA 8(a), MDOT MBE, STARS II GWAC

BSG!
Business Solutions Group

Yelena Madorsky
CEO/Business Development Principal

1590 Lancaster Green,
Annapolis, MD 21401
bsg.us.com

Office 410.849.8916
Fax 410.849.2565
Mobile 410.980.0772
Email ymadorsky@bsg.us.com

Email

MDOT Certified MBE: Yes X No ______

Narayan V Athreya
Principal

ICUBE

Information Integration & Innovative Solutions

ICUBE Systems, Inc.
8280 Willow Oaks Corporate Drive
Suite 600
Fairfax, VA 22031

Office 703 . 222 . 3636
Mobile 703 . 362 . 4595
Fax 703 . 995 . 0660

www.icubesys.com

nvathreya@icubesys.com

Email

MDOT Certified MBE: Yes X No ______

Name

Company

Address

Telephone

IT Consulting Services

SBA 8(a), MDOT MBE, STARS II GWAC

BSG
Business Solutions Group

Mark Conrad, MSIT, PMP, CSM, ITIL
Senior Project Manager

Mobile 202.258.0145
Fax 410.849.2565
Email mark.conrad1@maryland.gov

1590 Lancaster Green
Annapolis, MD 21401
bsg.us.com

Email

MDOT Certified MBE: Yes X No ______

ITNOVA

Jim Black
Project Manager
jblack@itnovaconsulting.com
Direct: 443-906-6077

108 Old Solomons Island Rd, L10
Annapolis, MD 21401
www.itnovaconsulting.com

Office: 443-906-6072
Fax: 443-472-4831

MBE

MDOT Certified MBE: Yes ✓ No ______

Name

Company

Address

Telephone

Email

MDOT

AMERICAN CABLING COMPANY

IT Consulting, Security & Cabling

acc RESOURCE IT STAFFING & SUPPORT

TOM BUXTON
EXECUTIVE DIRECTOR

TOM.BUXTON@ACCRESOURCE.COM
551 COMMERCE DRIVE, SUITE B
UPPER MARLBORO, MD 20774

(O) 301-390-2774
(M) 301-233-0808
(F) 301-390-7840

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Tuesday, October 4 2016, 9:00 a.m.

PLEASE SIGN IN OR ATTACH A BUSINESS CARD

Na
Co
Ad
T
E

CAI
Computer Aid, Inc.

Leo Hussey
Maryland Branch Manager

111 Warren Road, Suite 14A
Hunt Valley, MD 21030
www.compaid.com

Office - 443.564.6442
Mobile - 610.742.5511
Leo_Hussey@compaid.com

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Name
Comp
Addre
Telep
Email

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cVe

Louis H. Bullock
Partner

8630-M Guilford RD Suite 201
Columbia, MD 21046

Office: 877.207.8897 ext. 703
Mobile: 240.461.8009
lbullock@sqnsystems.com
www.sqnsystems.com

MDOT Certified MBE: Yes X No _____

VSBE

apv

8(A) WOSB

Theresa Boyle
Office Manager
tboyle@apvit.com

A P Ventures

Website Design & Development
Custom Programming
E-Learning
ERP solutions
Strategic Staffing

9520 Berger Road
Suite 107/109
Columbia, MD 21046
Direct: 240-417-1165
Office: 443-542-9188
Fax: 443-542-9243
www.APVit.com

Email

MDOT Certified MBE: Yes X No _____

Name
Company
Address
Telephone
Email

ITNOVA

Carolina Seldes
CEO, Senior Program Manager
cseldes@itnovaconsulting.com
Direct: 443-906-6073
Mobile: 443-926-4691

108 Old Solomons Island Rd, L10
Annapolis, MD 21401
www.itnovaconsulting.com

Office: 443-906-6072
Fax: 443-472-4831

MDOT Certified MBE: Yes X No _____

Name
Comp
Addre
Telept
Email

Tarak D. Shah
Principal

43676 Trade Center Place
Suite #235
Sterling, VA 20166
Tel: (703) 574 3210
Cell:(267) 266 0038
Fax:(703) 574 3211
Email: tshah@mindboard.com
www.mindboard.com

Mindboard
YOUR EASY BUTTON

MDOT Certified MBE: Yes X No _____

Name
Comp
Addre
Telep
Email

HEATH GOISOVICH
Account/Resourcing Manager

10380 Old Columbia Road
Suite 100
Columbia, MD 21046
443-552-5851 ext 104
443-534-3516
443-283-4010
hgoisovich@dkconsult.net

DK CONSULTING
A WOMAN OWNED SMALL BUSINESS

www.dkconsult.net

MDOT Certified MBE: Yes _____ No _____

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IT Management Consulting Services TORFP- # E00B6400091

Tuesday, October 4 2016, 9:00 a.m.

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Name Ted Ridley
Company CMT Services, Inc
Address 1827 Brightseat Rd
Hyattsville, MD 20785
Telephone 202.445.8700
Email tridley@cmtservicesinc.com
MDOT Certified MBE: Yes ✓ No

Name Brian Zernhelt
Company Software Consortium
Address 8815 Centre Park Drive
Columbia, MD 21045
Telephone 410-740-1910 - 104
Email BZERNHELT@SoftwareConsortium.com
MDOT Certified MBE: Yes No ✓

Varetta Huggins, PMP, CSM, ITIL, PgMP
President & Chief Executive Officer
Project Management Consulting LLC
Varetta.Huggins@v-pmc.com
(301) 828-5545 (M)
8(a), D/M/SBE, WOSB & EDWOSB
V-PMC, LLC
12410 Milestone Center Drive, Suite 600
Germantown, MD 20876
(240) 499-2826 (O)
(877) 761-6908 (F)
www.v-pmc.com
MDOT Certified MBE: Yes ✓ No

Name Linda Duffy
Company ATS
Address 405 William Ct
Balto Md 21220
Telephone 410-344-1256
Email lindad@appliedtechnologyservices.Co
MDOT Certified MBE: Yes ✓ No

Name
22nd Century Technologies, Inc.
CMMI Level 3 Company
SBA 8(a) Certified
Jatin Khanna
Director Federal Business Development
251 Greensboro Drive
McLean, VA 22102
Phone: 703-436-4597
Mobile: 732-824-2688
Fax: 703-436-2147
Email: jatink@tscti.com
ISO 9001:2008
ISO 20000-1:2011
ISO 27001:2005
www.tscti.com

Name
Company
Address
Telephone
Email
MDOT Certified MBE: Yes ✓ No

ANGARAI
...... where Excellence is a HABIT
Venkat Subramanian, BSc, MBA, PMP, ITIL
President & CEO
7331 Hanover Parkway, Suite C & D
Greenbelt, MD 20770
vsubramanian@angarai-intl.com
410.472.6001 (W)
301.523.7230 (M)
240.542.4003 (F)
+91 95000 72000 (India)
www.angarai-intl.com
8(a) GSA MBE DBE

PRE-PROPOSAL CONFERENCE

IT Management Consulting Services TORFP- # E00B6400091

Tuesday, October 4 2016, 9:00 a.m.

PLEASE SIGN IN OR ATTACH A BUSINESS CARD

Powersolv
YOUR TECHNOLOGY PARTNER

Beth A. Wong
VP Business Development for State, Local & Education
Mobile: 301-395-1039 Work: 703-230-5500 ext. 23
Email: wongba@powersolvinc.com

MDOT Certified MBE: Yes ✓ No ______

Name ______________________
Company ______________________
Address ______________________
____
Telephone ______________________
Email ______________________
MDOT Certified MBE: Yes _____ No ______

ITNOVA

Jim Black
Project Manager
jblack@itnovaconsulting.com
Direct: 443-906-6077

108 Old Solomons Island Rd, L10
Annapolis, MD 21401
www.itnovaconsulting.com

Office: 443-906-6072
Fax: 443-472-4831

MDOT Certified MBE: Yes _____ No ______

Name ______________________
Company ______________________
Address ______________________
____
Telephone ______________________
Email ______________________
MDOT Certified MBE: Yes _____ No ______

NAVIGATOR
MANAGEMENT PARTNERS

RICHARD WALEGA

Senior Vice President
410.419.4629
rwalega@navmp.com
navmp.com

o ✓

Name ______________________
Company ______________________
Address ______________________
____
Telephone ______________________
Email ______________________
MDOT Certified MBE: Yes _____ No ______

<u>Questions/Responses</u>

1) **QUESTION:** Submission Date/Time: Given the critical nature of this project, would the Comptroller (COM) consider extending the submission date by at least one week?

RESPONSE: The COM agrees to extend the due date and time for questions to 10/13/16 at 5:00 PM EST and to extend the closing date and time for proposal submissions to 10/20/16 at 5:00 PM EST.

2) **QUESTION:** Section 4.4.1.a. - It is unclear as to the specific format and detail you are requesting vendors to provide their responses in this section which could result in inconsistent proposal responses. Please provide a specific template for the order (by section) and details that need to be completed for this section. For example, do vendors need to respond to requirement 3.6.4 - TO Contractor Personnel Duties and Responsibilities in this section since vendors are again asked to provide a similar response regarding Key Personnel as part of a response to 4.4.1 C.?

RESPONSE: Section 4.4.1.A addresses the format of the TO Technical Proposal. Additional notes have been added (in **bold**) for clarification. The COM will not be providing any additional templates other than those already included in the TORFP.

4.4.1 TO Technical Proposal

A) Proposed Services

1) Executive Summary: A one-page summary describing the Offeror's understanding of the TORFP scope of work (Section 3) and proposed solution. **The format for this item is a one-page narrative summary.**

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, responsibilities, and deliverables outlined in Section 3. The proposed solution shall include: a description of the tools recommended to support the services furnished under this TO and how they would be used; plans for engaging end users; plans for capturing and applying lessons learned; and strategy for making resources available within schedule and budget constraints. **The format for this item is a description that is organized to match all of the requirements, responsibilities, and deliverables outlined in Section 3 – Scope of Work.**

3) SDLC Methodology: Offeror shall describe, as it relates to each type of service requested under this TORFP, their recommended SDLC approach for meeting the Agency's needs. The description must include a method for planning and sizing the work to be performed under this TORFP. Additionally, the description must include an explanation of how the following will function in conjunction with the Offeror's proposed methodology: project management (including quality control), communication and collaboration with the Agency, documentation, and reporting. Offerors may propose different methodologies for each of the three primary categories of work listed in 3.1. **The format for this item is a description of the**

recommended SDLC approach for meeting the Agency's needs for each of the following services requested under this TORFP: Project Management and Oversight Services, System Integration Services, and Cultural Change Management Services.

4) Draft Work Breakdown Structure (WBS) or equivalent: A matrix or table that shows a breakdown of the known tasks required to complete the requirements and deliverables in Section 3 - Scope of Work. The WBS should reflect the chronology of tasks without assigning specific time frames or start / completion dates. The WBS may include tasks to be performed by the COM or third parties, for example, independent quality assurance tasks. If the WBS appears as a deliverable in Section 3 – Scope of Work, the deliverable version will be a final version. Any subsequent versions shall be approved through a formal configuration or change management process. **The format of this item is a matrix or table that shows a breakdown of the know tasks required to complete the requirements and deliverables in Section 3 – Scope of Work which includes, at a minimum, a reference linking the known tasks to each requirement, responsibility, and deliverable in Section 3 – Scope of Work, as well as the chronology of the tasks.**
5) Draft Project or Work Schedule: A Gantt or similar chart containing known tasks and estimated time frames for completing the responsibilities, requirements, and deliverables in Section 3 - Scope of Work. The final schedule should come later as a deliverable under the TO after the TO Contractor has had an opportunity to develop realistic estimates. The Project or Work Schedule may include tasks to be performed by the COM or third parties. **The format of this item is a Gantt or similar chart.**
6) Assumptions: A description of any assumptions formed by the Offeror in developing the TO Technical Proposal. **The format of this item is a narrative description.**
7) Tools the Master Contractor owns and proposes for use to meet any requirements in Section 3. **The format of this item is a narrative description.**

3) **QUESTION:** Number of contract awards - Please confirm that the COM plans to make only one contract award for this procurement.

RESPONSE: This will confirm that the COM plans to make only one award for this TORFP. This is stated in Section 1.3 "Based upon an evaluation of TO responses, **a** Master Contractor will be selected to conduct the work defined in Section 3 – Scope of Work" (emphasis added).

4) **QUESTION:** Has the State made a decision on whether you can grant this extension request for additional time so that we can prepare our best proposal to be delivered on or after October 27th?

RESPONSE: See response to question #1.

5) Would the State please consider extending the proposal due date for this solicitation by at least two weeks to October 27th or later?

   RESPONSE: See response to question #4.

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

   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.

Questions/Responses #2

1. **QUESTION:** Does COM require an Offeror to maintain a current insurance policy for 'Cyber Security /Data Breach' at the time of its proposal **OR** it would be possible to obtain Cyber Security /Data Breach Insurance policy when an Intend to Award Notice is issued to the Offeror (or perhaps NTP)?

   RESPONSE: A Master Contractor may obtain the required Cyber Security/Data Breach insurance after an Intend to Award Notice is issued.

   Other required insurance must be submitted within 10 days of recommendation of award, the TO Contractor must submit their insurance with the required amounts and have the COM named as an additional Insured.

2. **QUESTION:** Can the awarded Prime utilize additional MBE / VSBE that were not submitted or Identified in their proposal?

   RESPONSE: An awarded Prime Contractor may utilize more MBE/VSBEs once the contract has been awarded. If they would want to increase the MBE/VSBE participation (i.e. 15% instead of 10%), then a formal modification must be done to add the additional subcontractors. If they do not wish to do so and are only adding more subcontractors that happen to be MBE/VSBE, then they would just need an approval from the Procurement Officer.

   Caveat: Once a MBE/VSBE has been identified and a participation percentage is committed to that subcontractor, the Prime Contractor cannot ***reduce*** the committed percentage of that specified MBE/VSBE. The only time that is permissible is if the subcontractor is not performing to standards, the Prime Contractor must involve GOMA before any committed to MBE/VSBE is removed formally from the contract. If that happens, the Prime Contractor must find another MBE/VSBE to fill the void with the committed percentage participation of the subcontractor that was removed.

3. **QUESTION:** Can you please clarify the Primary Place of Performance for this engagement? Page 2, Key Information Summary Sheet says 301 West Preston Street, Baltimore, MD 21201. Page 37, section 3.6.3.1 Work Location says Annapolis, MD.

   RESPONSE: The primary place of performance for this TO will be Annapolis, MD. However, the COM has major operational facilities in Annapolis and Baltimore. Accordingly, as stated in Section 3.6.3.1, additional work may be performed at 301 W. Preston Street, Baltimore, MD 21201, or at any other site designated by the COM.

4. **QUESTION:** Section 3.8.4, Pages 44 – 50
   Some items in the fourth column titled, "Timing", use "business days" while others use "days". Please clarify each entry as to whether TO Contractors should plan using "business days" or "calendar days".

   RESPONSE: Where "business days" are specified, TO Contractors should plan using business days. Business days are defined as Monday through Friday; excluding State holidays (see Section 1.20). Where "days" are used without any reference to "business", TO Contractors should plan using calendar days.

5. **QUESTION:** Section 3.6.3.3, Page 37
   Please clarify the look and feel of the "Deliverables Inventory" and "Deliverable Expectation Documents". For example, is the "Deliverables Inventory" simply a server folder that contains all DED Word Documents? Or does COM expect a tracking system to be developed by the TO Contractor regarding each deliverable and work product?

   RESPONSE: It is anticipated that the Deliverables Inventory will based upon the table in Section 3.8.4, and will include a Deliverable ID, name, description, timing, as well as a status of each deliverable. In addition to the deliverables currently listed in the table in Section 3.8.4, additional deliverables will be added to the Deliverables Inventory, after award, that will describe the specific work products for which the TO Contractor has responsibility, taking into consideration the approved SDLC methodology and the TO Contractor's proposed approach to completing the services under this Task Order.

   It is anticipated that Deliverables Expectation Documents will follow a mutually agreed upon format that will, at a minimum, describe the content, schedule, acceptance criteria, and intent for each work product in the Deliverables Inventory.

6. **QUESTION:** In Section 3.6.1.8, COM requests a TO Contractor-proposed SDLC methodology; however, in multiple sections (e.g., Section 3.3 and Section 3.6.3.2), COM states that the TO Contractor will ultimately use the SDLC defined by the Implementation Contractor (IC). Furthermore, in Section 3.6.1.3, COM states that SDLC documents have already been created by COM and will be transitioned to the TO Contractor. Additionally, according to our understanding of MITDP projects, DoIT requires the use of the State of Maryland SDLC. As such, would COM please address the following:
   - What do you anticipate occurring regarding the use of multiple SDLC methodologies during this project?

     RESPONSE: The COM anticipates that the TO Contractor will propose the SDLC methodology/ies it feels is best suited for providing the three services and corresponding tasks required under this Task Order. Upon award of an implementation contract for the ITS, the COM and the TO Contractor will need to consider the SDLC approach of the vendor awarded the ITS contract, and determine whether or not any adjustments to the TO Contractor's SDLC approach or deliverables are required. To the extent that some work under this Task Order will be deeply integrated with the work of the ITS vendor (for example, Project Management and Oversight), the approaches will need to align. To the extent that other work may be less dependent on the methodology of the ITS vendor (for example, data clean-up of COM legacy data prior to the ITS implementation and retirement of COM legacy systems), it may be that no change to the TO Contractor's proposed methodology is required. All parties are expected to be flexible so that the ultimate goal of a successful ITS implementation can be achieved.

- What SDLC is COM using for current SDLC documentation?

  The COM has followed the Department of Information Technology's (DoIT) State System Development Life Cycle (SDLC) methodology (2010 revisions), and used the available DoIT templates for SDLC documentation, as those were in place at the time the Compass project began.

- Please clarify your expectations of the TO Contractor regarding the use of multiple SDLCs within the project.

  RESPONSE: The COM expects the TO Contractor to propose one or methodologies to deliver the services required under this Task Order. A TO Contractor may propose one methodology for all 3 services, or may, for example, propose that Methodology A is best suited for providing Project Management and Oversight and System Integration Services while Methodology B is better suited for providing Cultural Change Management Services (which, strictly speaking, is not software development). The TO Contractor should propose the approach (es) it feels is/are the best for completing the work required under this Task Order.

  As stated above, the COM has followed the Department of Information Technology's (DoIT) State System Development Life Cycle (SDLC) methodology (2010 revisions), and used the available DoIT templates for SDLC documentation as those were in place at the time the Compass project began. That methodology is waterfall-based. Under the current administration, the COM has been notified that DoIT now strongly prefers an Agile methodology for major IT projects in the State, specifically Scaled Agile Framework (SAFe). DoIT is currently working to update its templates accordingly, but to date, no new templates have been released. However, DoIT has indicated a willingness to be flexible and review the proposed methodology for each major IT project on a case-by-case basis based on the particulars of the implementation.

  The primary goal of the Compass project is the successful implementation of an integrated tax system (ITS). To the extent that the ITS vendor (not yet selected) has had success implementing similar systems in other states with a particular implementation approach (which may be a pure or a hybrid approach), the COM anticipates following the ITS vendor's recommendations regarding the ITS implementation approach. The COM is aware of other states with successful ITS implementations that have followed an iterative approach.

While the work of the TO Contractor and the ITS vendor are separate, and therefore may support differences in approaches based on particular tasks or services, the TO Contractor is expected to be flexible in working with eventual ITS vendor so that the common goal of a successful ITS implementation is achieved. The extent to which the work of the TO Contractor and the ITS vendor is interrelated will determine the appropriate level of coordination. For example, if the ITS vendor uses Methodology C, then the Project Management and Oversight services provided under this TO will need to be tailored appropriately to Methodology C.

7. **QUESTION:** Section 3.6.5
   Please provide the version of Microsoft® Office that TO Contractors should have installed on laptops.

   RESPONSE: Version 2010 or later.

8. **QUESTION:** Section 3.6.5
   Please provide the version of Microsoft® Project that TO Contractors should have installed on laptops.

   RESPONSE: Version 2010 or later.

9. **QUESTION:** Section 3.6.5
   Please provide the version of Microsoft® Visio that TO Contractors should have installed on laptops.

   RESPONSE: Version 2010 or later.

10. **QUESTION:** Section 2.1.1.A, Page 17
    In reference to minimum requirement A., could COM further explain the $10 million implementation cost requirement? For example, to be considered a qualifying implementation project, must it be valued at $10 million dollars or greater? Or to be considered a qualifying implementation project, must the Master Contractor have profited $10 million dollars or greater from completing the project?

    RESPONSE: A qualifying project must have had a cost in excess of $10M. There is no minimum requirement regarding the Master Contractor's profits.

Questions/Responses #3 of 3

1 **QUESTION:** We respectfully request deadline for submission of proposals be extended to October 27, 2016.
RESPONSE: Yes, COM agrees to extend this TORFP to **close on October 27, 2016, 3:00 PM EST**.

QUESTION: General — Who is the current vendor providing the services requested in this RFP?
RESPONSE: This is a new solicitation. There is no current vendor.

2 **QUESTION:** Sec 1.4 — **"The date and time of an e-mail TORFP submission is….. TO Procurement Officer's e-mail inbox"**
Whereas Pre-Proposal Conference Meeting Agenda & Discussion Summary document says,
"The COM will not accept email or fax delivery proposals." [Point 4 (b)(i) - Page 3 of 9] Therefore, please clarify which form of submission would be accepted?

RESPONSE: Email submissions are strongly preferred, but paper submissions will also be accepted. Fax submissions will not be accepted.

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3 **QUESTION:** Sec 2.1.1 — It is mentioned that "**Only Master Contractor qualifications may be used to demonstrate meeting company minimum qualifications".** But in the minimum requirements point C, D and E, it states that "A subcontractor may be used to meet this requirement". Please clarify which one will be considered?

RESPONSE: Only Master Contractor qualifications may be used to demonstrate meeting company minimum qualifications except in those instances where the TORFP explicitly states that a subcontractor may be used to meet a requirement.

4 **QUESTION:** Sec 2.2.2 — E. It is mentioned that the Project Manager should have one year of experience participating in the implementation of integrated tax system.

F. It is mentioned that the Project Manager should have Professional Knowledge of Federal and/or State tax administration.

G. It is mentioned that the Project Manager should have atleast one year of demonstrated professional experience with application of internal revenue service publications 1075 tax information security guidelines.

H. It is mentioned that the Project Manager should have atleast one year of demonstrated experience using State of Maryland's Department of Information Technology(DoIT) Guidelines, methodologies and templates.

All the above Points are mentioned in Preferred Qualifications. Is it mandatory that Project Manager should qualify all the above points?

RESPONSE: Preferred qualifications are not mandatory for any of the Key Personnel, including the Project Manager. Only minimum qualifications (see Section 2.1.2 for Offeror's Personnel Minimum Qualifications) are mandatory. An Offeror may be evaluated higher for its experience, capability, and references if its personnel meets or exceeds the preferred qualifications.

5 **QUESTION:** Sec 2.2.2

L. It is mentioned that the Project Manager shall have the following professional certifications.
CPA, M.B.A., J.D., ITIL, PMI-ACP, SAFe™ Agilist certification, and/or other relevant agile certification.
The above qualifications are mentioned in preferred qualifications. Is it mandatory that Project Manager should have all professional certifications/qualifications mentioned?

RESPONSE: No.

6 **QUESTION:** Sec 2.2.3

I. It is mentioned that the Project Manager Assistant should have at least one year of experience participating in the implementation of an integrated tax system.

J. It is mentioned that the Project Manager Assistant should have Professional knowledge of federal and/or state tax administration.

K. It is mentioned that the Project Manager should have at least one year of demonstrated professional experience with application of Internal Revenue Service Publication 1075 tax information security guidelines.

L. It is mentioned that the Project Manager Assistant should have at least one year of demonstrated experience using State of Maryland's Department of Information Technology's (DoIT) guidelines, methodologies, and templates.

All the above Points are mentioned in Preferred Qualifications. Is it mandatory that Project Manager Assistant should qualify the above points?

RESPONSE: Preferred qualifications are not mandatory for any of the Key Personnel, including the Project Management Assistant. Only minimum qualifications (see Section 2.1.2 for Offeror's Personnel Minimum Qualifications) are mandatory. An Offeror may be evaluated higher for its experience, capability, and references if its personnel meets or exceeds the preferred qualifications.

7 **QUESTION:** Sec 2.2.3

R. It is mentioned that the Project Manager Assistant shall have the following professional certifications.
CPA, M.B.A., J.D., ITIL, PMI-ACP, SAFe Agilist certification, and/or other relevant agile certification.

The above qualifications are mentioned in preferred qualifications. Is it mandatory that Project Manager Assistant should have all professional certifications/qualifications mentioned?
RESPONSE: No.

8 **QUESTION:** Sec 2.2.4

G. It is mentioned that the System Integration Architect shall have at least one year of experience participating in the implementation of an integrated tax system.

H. It is mentioned that the System Integration Architect shall have Professional knowledge of federal and/or state tax administration.

I. It is mentioned that the System Integration Architect shall have at least one year of demonstrated professional experience with application of Internal Revenue Service Publication 1075 tax information security guidelines.

J. It is mentioned that the System Integration Architect shall have at least one year of demonstrated experience using State of Maryland's Department of Information Technology's (DoIT) guidelines, methodologies, and templates.

All the above Points are mentioned in Preferred Qualifications. Is it mandatory that System Integration Architect should qualify the above points?

RESPONSE: Preferred qualifications are not mandatory for any of the Key Personnel, including the System Integration Architect. Only minimum qualifications (see Section 2.1.2 for Offeror's Personnel Minimum Qualifications) are mandatory. An Offeror may be evaluated higher for its experience, capability, and references if its personnel meets or exceeds the preferred qualifications.

9 **QUESTION:** Sec 2.2.4

M. It is mentioned that System Integration Architect shall have the following professional certifications
ITIL, PMI-ACP, SAFe Agilist certification, and/or other relevant agile certification.

The above qualifications are mentioned in preferred qualifications. Is it mandatory that System Integration Architect should have all professional certifications/qualifications mentioned?

RESPONSE: No.

10 **QUESTION:** Sec 2.2.5

D. It is mentioned that the Cultural Change Management Lead should have at least one year implementing an organizational CCM plan for an agency implementing an integrated tax system.

E. It is mentioned that the Cultural Change Management Lead should have Professional knowledge of federal and/or state tax administration.

F. It is mentioned that the Cultural Change Management Lead should have at least one year of demonstrated professional experience with application of Internal Revenue Service Publication 1075 tax information security guidelines.

All the above Points are mentioned in Preferred Qualifications. Is it mandatory that Cultural Change Management should qualify the above points?

RESPONSE: referred qualifications are not mandatory for any of the Key Personnel, including the Cultural Change Management Lead. Only minimum qualifications (see Section 2.1.2 for Offeror's Personnel Minimum Qualifications) are mandatory. An Offeror may be evaluated higher for its experience, capability, and references if its personnel meets or exceeds the preferred qualifications.

11 **QUESTION:** General

Can Subcontractors, Temporary Staff or 1099 contractors be proposed as Key Personnel?

RESPONSE: Yes.

12 **QUESTION:** Sec 3.6.5

Will MS Project, Visio or any other products installed in TO Contractor's desktop or laptop be considered as COM property? Will the TO Contractor's desktop also be part of COM property? Please clarify.

RESPONSE: MS Office, Project, and Visio installed on the TO Contractor provided personal computers will not be considered COM property. However, all documents and files created using these programs as part of the work of this Task Order will be considered property of the COM. The personal computers the TO Contractor is required to provide for TO Contractor Personnel will not be considered COM property.

13 **QUESTION:** Sec 3.13.1

Should the offeror need to maintain or furnish Cyber Security/Data Breach Insurance policy of ten million dollars while submitting the proposal?

RESPONSE: An Offeror need not maintain or furnish the Cyber Security/Data Breach Insurance policy while submitting the proposal. A Master Contractor may obtain the required Cyber Security/Data Breach insurance after an Intend to Award Notice is issued.

14 **QUESTION:** What is the ceiling value of the contract?

RESPONSE: The COM has not established a ceiling value of the contract; however, prices quoted on Price Sheet (Attachment 1) may not exceed the maximum labor rates established in the CATS+ Master Contract.

15. **QUESTION:** Will evaluation of an offer be affected by selection of the intent to request a waiver of the MBE goals on Attachment 2?

    RESPONSE: A request for a waiver of the MBE goal has no effect on the selection process, as long as the Offeror's request follows the provisions of COMAR 21.11.03.11 and the MBE forms attached in the TORFP.

16. **QUESTION:** Will evaluation of an offer be affected by selection of the request for a waiver of the VSBE goals on Attachment 14?

    RESPONSE: A request for a waiver of the VSBE goal has no effect on the selection process, as long as the Offeror's request follows the provisions of COMAR 21.11.13.07 and the VSBE forms attached in the TORFP.

17. **QUESTION:** The Key Information Summary Sheet states the MBE goal is 15% and the VSBE goal is 1%. Will a proposal be rated more favorably if the MBE participation is higher than 15% and/or the VSBE participation is higher than 1%?

    RESPONSE: No.

18. **QUESTION:** Will a proposal be rated less favorably if the MBE participation is lower than 15% and/or the VSBE participation is lower than 1%?

    RESPONSE: Proposals with an MBE participation rate of less than 15% and/or a VSBE participation rate of less than 1% must include a request for a waiver. A request for a waiver of the MBE goal and/or the VSBE goal has no effect on the selection process, as long as the Offeror completes the required MBE and VSBE forms and follows the appropriate Maryland regulations, as noted above.

Questions/Responses #4 of 4

1. **QUESTION:**

Also, in reading the most recent responses, you indicate that it is acceptable to bid subcontractors, 1099s or temporary staff as Key personnel, however, regarding Section 3.7.3 Substitution of Personnel, we interpreted the section that it may be grounds for disqualification if a vendor requests to substitute a key resource either 30 days prior or 30 days after the initial TO if the resource is not a full time employee. We assume that the proposed key personnel need to either be a full time employee of the prime or a full time employee of any subcontractor.

RESPONSE:

The TO does not require that proposed Key Personnel be either full time employees of the Master Contractor or full time employees of any subcontractor. However, an Offeror who proposes Key Personnel that are not full time employees of the Master Contractor or a subcontractor does so at its own peril, in view of the Substitution of Personnel requirements in Section 3.7.3. As stated in Section 3.7.3.1, prior to Task Order Execution or within thirty (30) days after Task Order Execution, one of the qualifying circumstances for substituting Key Personnel is that the Offeror must demonstrate that the originally proposed personnel are actual full-time direct employees with the Offeror (subcontractors, temporary staff, or 1099 contractors do not qualify).

Questions/Responses #5 of 5

1. In Amendment #1 in the Minimum Qualifications section it states:

    "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."

    Question: Does this qualification relate to one of the key individuals proposed, or can the company (or subcontractor) demonstrate corporate experience to meet this qualification?

    Response: In order for an offeror company to satisfy this minimum qualification (2.1.1C), at least one of the proposed key personnel must possess the experience listed in this qualification, and the offeror company's proposal must include that qualifying individual. A demonstration of corporate experience not attributable to one of the proposed key personnel will not satisfy this qualification.

2. In Amendment #1 in the Preferred section Qualifications it states:

    "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."

    Question: Does this qualification relate to one of the key individual proposed, or can the company (or subcontractor) demonstrate corporate experience to meet this qualification?

    Response: Preferred qualification 2.2.1C indicates that the COM prefers at least one of the proposed key personnel possess the experience listed in this qualification, and that the offeror company's proposal include that qualifying individual. A demonstration of corporate experience not attributable to one of the proposed key personnel will not satisfy this qualification.

3. **Question**: Will COM allow a company that is dually certified as a MBE and VSBE fulfill both requirements on this TORFP?

    Response: Yes.

4. **Question**: We had become aware of this RFP late and decided to pass on it because of time constraints; however, we see you have now extended this to November 30, 2016. We have reviewed this again and have an interest in presenting a bid if the State is willing to further extend the submission deadline to December 16, 2016. Especially considering the Thanksgiving week just before submission, we feel this extension will give us sufficient time to review the requirements and prepare a strong proposal for this Solicitation.

    Response: No, the TORFP closing date remains November 30, 2016, 2:00PM, EST.

Questions/Responses #6 of 6

Question 1 Section 4.4.1 C) 3)

TORFP Text: It is stated that "provide documentation of the minimum educational requirements for each of the Key Personnel as described in Section 2.1.2".

Question: The education details for the proposed personnel are presented in Attachment 5A and 5B. Please clarify COM's expectations on the required "documentation".

Response: The Offeror should submit proof that the required degree was awarded by an accredited college or university to the proposed Key Personnel in the required discipline; for example, by providing a copy of a diploma or college/university transcript.

Question 2. Section 4.4.1 C) 4 iv)

TORFP Text: It is stated that "the services provided, scope of the contract, and performance objectives satisfied as they relate to the minimum and preferred qualifications of key personnel proposed under this TORFP".

Question: Please clarify COM's expectations.

Response: For each reference provided, please provide a description of the services provided by the Key Personnel to that reference, the scope of the contract, and the performance objectives of the contract performed for the reference as they relate to the minimum and preferred qualifications of Key Personnel.

Question 3. Worksheet in L – Tax Project Resources

Column D – Year 1 Total Class Hours

Question: The hours indicated in this column represent actual hours or estimated hours?

Response: The total class hours are not to be construed as "guaranteed" hours; the total number of hours is an **estimate** only for purposes of price sheet evaluation.

Question 4. Pricing proposal has Column D with "total class hours" the hours indicated in this column.

Question: Are these actual hours or estimated hours?

Response: The total class hours are not to be construed as "guaranteed" hours; the total number of hours is an **estimate** only for purposes of price sheet evaluation.

Questions/Responses #7 of 7

Question: Attachment 5, 5a and 5b: Please Clarify ***TORFP Additional Requirements n/a*** mentioned on the left side of the form 5A. Do we leave it blank because its specifies n/a or we add details from the proposal.

Response: There are no TORFP Additional Requirements related to minimum qualifications beyond those already listed on Attachment 5A, so leaving that area blank is appropriate.

Section number:	3.1 Purpose
Paragraph number:	1
Page Number:	23
Text of Passage Being Questioned:	You have stated, "The COM is issuing this CATS+ TORFP to obtain IT management consulting services in accordance with the scope of work described in this Section 3 to assist the COM in managing the Compass project, including coordination of COM resources and oversight of the Compass project's Implementation Contractor (IC) throughout the course of the implementation and into the maintenance phase of the project."
Question:	Do you expect the four key resources to continue through the length of the project including implementation and maintenance?

Response: We expect the four key personnel to continue through the ITS implementation. The work of the key personnel will likely overlap with at least the beginning of the maintenance phase of the ITS implementation. The length of this TORFP is three (3) years with two one-year option periods.

Section number:	3.1. Purpose
Paragraph number:	Systems Integration Service
Page Number:	23
Text of Passage Being	This TO requires system integration services which will

Questioned:	assist the COM in planning, executing, and managing the migration from legacy systems to the Compass ITS in coordination with the IC, maintaining continuity during the phased implementation.
Question:	Do you expect the vendor to perform data conversion and interface activities? Do you expect the vendor to provide you resources needed for these activities?

Response: We expect the TO Contractor to plan and manage the COM's efforts with regard to data conversion and temporary interfaces, with the COM providing the resources to complete the actual conversion and interface tasks. If additional resources were required to perform the data conversion and/or interface activities, those would need to be requested via the Work Order process.

Section number:	3.3
Paragraph number:	
Page Number:	26
Text of Passage Being Questioned:	Major Compass components include acquisition and implementation of an integrated tax system, delivering cultural change management to stakeholders, architecting and managing the integration of the ITS into the COM's existing infrastructure systems and business processes, and planning and managing the retirement of systems and processes made obsolete by the new ITS.
Question:	Does it mean, the IC will provide all these services including CCM, data conversion, and interfaces to other systems? Is this a contradiction to what you have stated in section 3.1? Can you please clarify?

Response: Section 3.1 explains the Purpose of this TORFP, while Section 3.3 Project Background provides background information for the overall Compass Project. The Compass project includes the work of the COM, the TO Contractor, the Implementation Contractor (IC), and all other associated work. This TO is only one part of the overall Compass project. The TO Contractor is specifically responsible for providing project management and oversight services, system integration services, and cultural change management services. The IC will **not** be providing CCM services ; CCM services are the responsibility of the TO Contractor under this TORFP. With regard to data conversion and temporary interfaces, the work of the TO Contractor will need to be coordinated with the work of the IC. We expect the TO Contractor to assist COM with the legacy portion of data conversion and temporary interfaces, while the IC will focus on the activities related to the new system.

Section number:	3.6.3
Paragraph number:	Cultural Change Management Services
Page Number:	36
Text of Passage Being Questioned:	Developing and delivering CCM training to educate up to 1,100 internal stakeholders on the business need for the ITS, the objectives of the project, and anticipated benefits of a modernized, integrated system. Training shall include, but is not limited to, instructor led sessions and computer based training, targeted by functional area and by organizational level as detailed in the approved CCM Plan.
Question:	Are you expecting the TO vendor to provide staff to develop CCM training material and conduct them throughout the duration of the project including Compass implementation?

Response: Yes.

Section number:	3.6.5 Requirements for hardware, software, and materials
Paragraph number:	
Page Number:	39
Text of Passage Being Questioned:	Regarding TO Contractor Personnel, the TO Contractor is responsible for providing, at its own cost, personal computers utilizing a Windows operating system and Microsoft Office.

Question:	Can the systems access both state system and the vendor's company system while on-site? What are the restrictions?

Response: Access to non-COM systems for the purpose of completing tasks required of the TO Contractor can be permitted; however, all such access is subject to monitoring and must follow existing COM policy and exception request procedures.

Section number:	3.7 Performance and Personnel
Paragraph number:	3.7.1
Page Number:	39 - 40
Text of Passage Being Questioned:	
Question:	The RFP has stated minimum and maximum hours in 3.7.1.c. It has also stated requirement of extended hours in 3.7.1.a and curtailed hours due to furlough etc. in 3.7.1.b. Will the state allow overtime if the resources must work long hours when required? Will the resources be allowed to make up hours for the furloughed period? How does the agency anticipate to address this?

Response: The COM may approve additional hours if warranted. It is the responsibility of the Project Manager to manage TO Contractor Personnel's work hours against approved Work Orders. All approved hours, even if in excess of 40 hr. per week, will be paid at the hourly labor rate applicable to the specific labor category. The State of Maryland is not currently under orders for any furloughs or Service Reduction Days. However, in the event furloughs or Service Reduction Days are ordered, TO Contractor Personnel shall be required to participate in the State-mandated Service Reduction Days as well as State Furlough Days.

Section number:	3.7.4 premises and Operational security
Paragraph number:	3.7.4.f
Page Number:	41 - 42

Text of Passage Being Questioned:	
Question:	Some states look for past 5 to 7 years and some go much further back for background check. How far back does the agency wants to go back for criminal investigation?

Response: The COM's full criminal background investigations review all available criminal history.

Section number:	3.8 Deliverables
Paragraph number:	3.8.2 Deliverable Acceptance
Page Number:	43
Text of Passage Being Questioned:	The TO Manager will issue to the TO Contractor a notice of acceptance or rejection of the deliverable in the DPAF (Attachment 8). Following the return of the DPAF indicating "Accepted" and signed by the TO Manager
Question:	Can the state provide guidance on how many days does the TO Manager need for acceptance of the deliverables?

Response: As stated in Section 3.8.1, a standard deliverable review cycle will be elaborated and agreed-upon between the COM and the TO Contractor. The length of time needed for review will likely depend on the nature and complexity of each deliverable.

Section number:	3.1.3.1. Cyber Security/ Data Breach Insurance
Paragraph number:	
Page Number:	54
Text of Passage Being Questioned:	If the services furnished by the TO Contractor involve accessing Sensitive Data the Contractor shall maintain Cyber Security / Data Breach Insurance in the amount often million dollars ($10,000,000) per occurrence for Security Incidents attributable to acts or omissions of the

	TO Contractor or TO Contractor personnel.
Question:	It seems to be a conditional statement. Does the agency expects the vendor to carry the insurance now or it is OK to have the insurance when needed? Can state provide some guidance?

Response: A Master Contractor may obtain the required Cyber Security/Data Breach insurance after an Intend to Award Notice is issued. Other required insurance must be submitted within 10 days of recommendation of award, the TO Contractor must submit their insurance with the required amounts and have the COM named as an additional Insured.

Section number:	4.4. Proposal format
Paragraph number:	
Page Number:	59
Text of Passage Being Questioned:	
Question:	The RFP mentions proposed methodology and SDLC methodology in A2 and A3 respectively. What does the agency expect in A2? Also, state has expressed its preference for SAFe methodology. Can we have a copy of the methodology?

Response: The response to A2 will be a detailed description of the proposed solution, while the response to A3 will specifically describe the recommended SDLC approach for each of the three services provided under the TO. The Department of Information Technology (DoIT) has not yet published information on Scaled Agile Framework (SAFe); however, information on this approach may be found at http://www.scaledagileframework.com/.

Section number:	3
Paragraph number:	3.1
Page Number:	23

Text of Passage Being Questioned:	System Integration Services
Question:	What are the integration channels and format of exchange for e.g. real time or batch services that currently exists and applies to the Integrated Tax Management System?

Response: The integration channel and format of exchange will be established by the implementation contractor (IC).

Section number:	3
Paragraph number:	3.1
Page Number:	23
Text of Passage Being Questioned:	System Integration Services
Question:	How many legacy systems exist as of today whose data need to be converted and integrated as a part of the Integrated Tax Management System?

Response: The specific data to be converted and integrated will be determined with input from the implementation contractor (IC). For an overview of existing COM systems, see Section 3.3.1.

Section number:	NA
Paragraph number:	NA
Page Number:	NA
Text of Passage Being Questioned:	NA
Question:	As the questions will, at best, be answered just before a long Thanksgiving holiday and the Proposal is currently due

	three days after returning from the Holiday, we would like to request a two week extension to submission date to allow us to review, digest and incorporate the answers into the strongest response possible.

Response: The TORFP closing date remains November 30, 2016, 2:00PM, EST.

Section number:	Pre-Bid Conference notes
Paragraph number:	3a
Page Number:	3
Text of Passage Being Questioned:	This solicitation has a … 1% VSBE subcontracting goal.
Question:	How does the State expect this to be filled as this would only be a part of a person?

Response: Offerors need to acknowledge that they intend to meet the overall verified VSBE participation goal or that they will be requesting a waiver.

Section number:	Worksheet L
Paragraph number:	
Page Number:	
Text of Passage Being Questioned:	
Question:	Are we expected to provide hourly rates for each labor category listed or only those that have "Total Class Hours" associated with them? If all labor categories, then how do we account for them being zeroed out in the formula?

Response: Offerors must provide hourly rates for each labor category listed in order for the Price Sheet to be complete. The spreadsheet will automatically perform all calculations for you. Total class hours listed are estimates only. It is possible that during the course of the TO that a work order could be requested by the TO Contractor and approved by the COM that involves a resource from a labor category that currently has an estimate of zero hours.

Section number:	Pre-Bid Conference notes
Paragraph number:	3a
Page Number:	3
Text of Passage Being Questioned:	This solicitation has a fifteen % MBE Subcontracting Goal and a one % VSBE subcontracting goal.
Question:	Do these vendors have to be CATS+ Master Contractors or can they have a similar distinction on another State contract?

Response: MBE and VSBE subcontractors do not have to be CATS+ Master Contractors.