



**TASK ORDER REQUEST FOR PROPOSALS (TORFP)
STATE OF MARYLAND
DEPARTMENT OF HUMAN RESOURCES
OFFICE OF TECHNOLOGY FOR HUMAN SERVICES**

**(REVISED) OTHS/OTHS/15-028-S
No. N00B4400094
AMENDMENT NO. 1**

October 23, 2014

Dear Master Contractors:

This amendment is being issued to amend certain information in the above-named TORFP. All information contained herein is binding on all Offerors who respond to this TORFP. Specific parts of the TORFP have been amended. The changes are listed below. New language has been double underlined and marked in **bold (i.e. word)**, and language that has been deleted has been marked with a strikethrough (i.e. ~~word~~).

1. Revise “Agency Control Number” wherever it appears throughout the document as follows:

OTHS/OTHS-15-~~028-S~~ to 14-015-S

2. Revise 2.10.1 OFFEROR’S COMPANY MINIMUM QUALIFICATIONS

Only those Master Contractors that fully meet all minimum qualification criteria shall be eligible for TORFP proposal evaluation. The Master Contractor’s proposal and references will be used to verify minimum qualifications.

The Master Contractor’s proposal shall demonstrate meeting the following minimum requirements:

- A. At least ten (10) years of experience providing project management services.
- B. At least one (1) year of experience with federal, state, or local governmental entities.
- C. At least one (1) year of experience with project management tools.
- D. At least one (1) year of experience using Automated Testing Tools and Quality Assurance Tools with defect logging and tracking capabilities.
- E. At least seven (7) years of experience with various phases of the software development lifecycle.
- F. At least one engagement, lasting a minimum of one (1) year, providing management consulting support services and staff to a U.S. based commercial or government entity with at least 5,000 end-users on one (1) contract.
- G. ~~Certification in Capability Maturity Model Integration (CMMI) level 2 or higher.~~

3. Revise 2.11 TO CONTRACTOR AND PERSONNEL PREFERRED QUALIFICATIONS

The following qualifications are preferred and will be evaluated as part of the technical proposal.

A. TO Contractor’s Program Manager (CPM)

Education: Master Degree preferred.

Specialized Experience: Health and Human Services experience strongly desired.



B. Senior Subject Matter Expert

Education: Master Degree preferred.

Specialized Experience: Health and Human Services experience strongly desired.

C. Quality Assurance Specialist

Specialized Experience: Health and Human Services experience strongly desired.

D. Senior IT Professional

Education: PMP certification from the Project Management Institute is preferred.

Specialized Experience: Health and Human Services experience strongly desired.

E. Company Certification in Capability Maturity Model Integration (CMMI) level 2 or higher. The Offeror can be certified at Maturity Level 2 or higher in any of the three areas of specialty (Development, Services, and/or Acquisitions).

Should you require clarification of the information provided in this Amendment, please contact me by email at richard.wright@maryland.gov or by phone at 410-238-1267.

By:
Richard Wright
Procurement Officer
Issued: October 23, 2014



**TASK ORDER REQUEST FOR PROPOSALS (TORFP)
ENTERPRISE PROJECT MANAGEMENT OFFICE**

**OTHS/OTHS/14-015-S
No. N00B4400094
AMENDMENT NO. 2**

October 31, 2014

Dear Master Contractors:

This amendment is being issued to amend certain information in the above-named TORFP. All information contained herein is binding on all Offerors who respond to this TORFP. Specific parts of the TORFP have been amended. The changes are listed below. New language has been double underlined and marked in **bold** (i.e. **word**), and language that has been deleted has been marked with a strikethrough (i.e. ~~word~~).

1. Revise 1.4 TO PROPOSAL SUBMISSIONS

The TO Procurement Officer will not accept submissions after the date and exact time stated in the Key Information Summary Sheet above. ~~The date and time of submission is determined by the date and time of arrival in the TO Procurement Officer's e-mail inbox arrival at the address listed in the Key Information Summary Sheet above.~~ **The date and time of submission is determined by the date and time of arrival in the TO Procurement Office as instructed in Section 3.2. Oral, electronic mail or facsimile Proposals will not be accepted.**

2. Revise 2.13.2 T&M INVOICE SUBMISSION PROCEDURE

Invoices shall be addressed to:
~~Sonia Marrero, EPMO Director~~ **Tiyashi Dastidar**
Department of Human Resources
Office of Technology for Human Services
1100 Eastern Boulevard
Essex, MD 21221

3. Revise 3.3 SUMMARY OF ATTACHMENTS

No attachment forms shall be altered. Signatures shall be clearly visible.

A. The following attachments shall be included with the TO Technical Proposal:

- Attachment 2-D-1 and D-2 -MBE Utilization and Fair Solicitation Affidavit & MBE Participation Schedule
- Attachment 4 – Conflict of Interest Affidavit and Disclosure
- Attachment 5 A and B – Labor Classification Personnel Resume Summaries



- Attachment 10— Non-Disclosure Agreement (Offeror)
- Attachment 13 – Living Wage Affidavit of Agreement
- Attachment 15-V-1 – Veteran-Owned Small Business Enterprise Utilization
- Attachment 16 - Certification Regarding Investments in Iran
- Attachment 20 – Certificate of HIPAA Compliance

B. The following attachments shall be included with the TO Financial Proposal:

- Attachment 1 Price Sheet

4. **Revise 3.4.1.B. Removal of CMMI minimum requirement per Amendment 1.**

<i>Reference</i>	Offeror’s Company Minimum Requirement	Evidence of Compliance
2.10.1.A	At least ten (10) years of experience providing project management services.	Offeror evidence of compliance here.
2.10.1.B	At least one (1) year of experience with federal, state, or local governmental entities.	Offeror evidence of compliance here.
2.10.1.C	At least one (1) year of experience with project management tools.	Offeror evidence of compliance here.
2.10.1.D	At least one (1) year of experience using Automated Testing Tools and Quality Assurance Tools with defect logging and tracking capabilities.	Offeror evidence of compliance here.
2.10.1.E	At least seven (7) years of experience with various phases of the software development lifecycle	Offeror evidence of compliance here.
2.10.1.F	At least one engagement, lasting a minimum of one (1) year, providing management consulting support services and staff to U.S. based commercial or government entities with at least 5,000 end-users on one (1) contract.	Offeror evidence of compliance here.
2.10.1.G	Certification in Capability Maturity Model Integration (CMMI) level 2 or higher.	Offeror evidence of compliance here.



5. Revise 4.1 LIST OF ATTACHMENTS

Attachment Label	Attachment Name	Applicable to this TORFP?	Submit with Proposal?§ (Submit, Do Not Submit, N/A)
Attachment 1	Price Sheet	Always Applicable	Submit with TO Financial Proposal
Attachment 2	Minority Business Enterprise Participation (Attachments D-1 – D-7)	Applicable	Submit with TO Technical Proposal
Attachment 3	Task Order Agreement (TO Agreement)	Always Applicable	Do Not Submit with Proposal
Attachment 4	Conflict of Interest Affidavit and Disclosure	Always Applicable	Submit with TO Technical Proposal
Attachment 5	Labor Classification Personnel Resume Summary	Applicable	Submit with TO Technical Proposal
Attachment 6	Pre-Proposal Conference Directions	Applicable	Do Not Submit with Proposal
Attachment 7	Notice to Proceed (Sample)	Always Applicable	Do Not Submit with Proposal
Attachment 8	Agency Receipt of Deliverable Form	Applicable	Do Not Submit with Proposal
Attachment 9	Agency Deliverable Product Acceptance Form (DPAF)	Applicable	Do Not Submit with Proposal
Attachment 10	Non-Disclosure Agreement (Offeror)	Always Applicable	<u>Do Not</u> Submit with TO Technical Proposal
Attachment 11	Non-Disclosure Agreement (TO Contractor)	Always Applicable	Do Not Submit with Proposal
Attachment 12	TO Contractor Self-Reporting Checklist	Always Applicable	Do Not Submit with Proposal
Attachment 13	Living Wage Affidavit of Agreement	Always Applicable	Submit with TO Technical Proposal
Attachment 14	Mercury Affidavit	Not Applicable	Not Applicable
Attachment 15	Veteran Owned Small Business Enterprise Utilization Affidavit (Attachments V-1 – V-4)	Applicable	Form V-1, submit with TO Technical Proposal
Attachment 16	Certification Regarding Investments in Iran	Always Applicable	Submit with TO Technical Proposal
Attachment 17	Sample Sub Task Order	Applicable	Do Not Submit with Proposal
Attachment 18	Performance Evaluation Form	Applicable	Do Not Submit with Technical Proposal



Attachment 19	Criminal Background Check Affidavit	Applicable	Do Not Submit with Technical Proposal
Attachment 20	Certificate of HIPAA Compliance	Applicable	Submit with Technical Proposal
Attachment 21	IRS Contractor Awareness Acknowledgement	Applicable	Do Not Submit with Proposal
Attachment 22	Dress Code	Applicable	Do Not Submit with Proposal
Attachment 23	MBE Participation Schedule for Use with MBE Amendments Only	Applicable	Do Not Submit with Proposal
Attachment 24	Glossary	Applicable	Do Not Submit with Proposal
Attachment 25	DHR Hardware Standards	Applicable	Do Not Submit with Proposal
Attachment 26	List of DHR Applications	Applicable	Do Not Submit with Proposal

~~*If not specified in submission instructions, any attachment submitted with response shall be in PDF format and signed~~

Should you require clarification of the information provided in this Amendment, please contact me by email at richard.wright@maryland.gov or by phone at 410-238-1267.

By:
Richard Wright
Procurement Officer
Issued: October 31, 2014



**TASK ORDER REQUEST FOR PROPOSALS (TORFP)
ENTERPRISE PROJECT MANAGEMENT OFFICE**

**OTHS/OTHS/14-015-S
No. N00B4400094**

Amendment No.3

December 2, 2014

Dear Master Contractors:

This Amendment is being issued to clarify certain information contained in the above named TORFP. All information contained herein is binding on all Master Contractors who respond to this TORFP. Specific parts of the TORFP have been amended. The changes are listed below. New language has been double underlined and marked in **bold (i.e. word)** and language that has been deleted has been marked with a strikethrough (i.e. ~~word~~). Master Contractors shall submit the attached Amendment Acknowledgement Form by 2 p.m. local time, December 17, 2014

1. Revise Key Information Summary Sheet (page 8), as follows:

Closing Date and Time:	December 10 19 , 2014 at 2:00 PM Local Time
------------------------	---

2. Revise Key Information Summary Sheet (page 8), as follows:

TO Type:	Time and Materials <u>Fixed Price and/or Time and Materials</u>
----------	---

3. Revise 1.12 MINORITY BUSINESS ENTERPRISE as follows:

~~This TORFP has MBE goals and sub-goals as stated in the Key Information Summary Sheet above. A Master Contractor that responds to this TORFP shall complete, sign, and submit all required MBE documentation at the time of TO Proposal submission (See Attachment 2 Minority Business Enterprise Forms and Section 3 Task Order Proposal Format and Submission Requirements). **Failure of the Master Contractor to complete, sign, and submit all required MBE documentation at the time of TO Proposal submission will result in the State's rejection of the Master Contractor's TO Proposal.**~~

1.12.1 MBE PARTICIPATION REPORTS

~~DHR will monitor both the TO Contractor's efforts to achieve the MBE participation goal and compliance with reporting requirements.~~

- ~~A. Monthly reporting of MBE participation is required in accordance with the terms and conditions of the CATS+ Master Contract by the 15th day of each month.~~
- ~~B. The TO Contractor shall provide a completed MBE Prime Contractor Paid/Unpaid MBE Invoice Report (Attachment 2 Form D-5) to DHR/OTHS at the same time the invoice is formally submitted.~~
- ~~C. The TO Contractor shall ensure that each MBE Subcontractor provides a completed monthly MBE Participation Form (Attachment 2 Form D-6).~~
- ~~D. The TO Contractor shall provide all completed forms, copies of invoices and checks paid to the MBE directly to the TO Procurement Officer and TO Manager, if requested for audit.~~
- ~~E. The prime and sub-contractor must submit their respective monthly MBE Participation Forms (Attachment 2 Forms D5 and D6) electronically to the designated email address to be determined at a later time. DHR/OTHS will monitor both the TO Contractor's efforts to achieve the MBE participation goal and compliance with reporting requirements.~~

This TORFP has MBE goals and sub-goals as stated in the Key Information Summary Sheet above.

A Master Contractor that responds to this TORFP shall complete, sign, and submit all required MBE documentation at the time of TO Proposal submission (See Attachment 2 Minority Business Enterprise Forms and Section 3 Task Order Proposal Format and Submission Requirements). Failure of the Master Contractor to complete, sign, and submit all required MBE documentation at the time of TO Proposal submission will result in the State's rejection of the Master Contractor's TO Proposal.

In 2014, Maryland adopted new regulations as part of its Minority Business Enterprise (MBE) program concerning MBE primes. Those new regulations, which became effective June 9, 2014 and are being applied to this Task Order, provide that when a certified MBE firm participates as a prime contractor on a contract, an agency may count the distinct, clearly defined portion of the work of the contract that the certified MBE firm performs with its own forces toward fulfilling up to fifty-percent (50%) of the MBE participation goal (overall) and up to one hundred percent (100%) of not more than one of the MBE participation subgoals, if any, established for the contract. Please see the attached MBE forms and instructions.

1.12.1 MBE PARTICIPATION REPORTS

DHR will monitor both the TO Contractor's efforts to achieve the MBE participation goal and compliance with reporting requirements.

- A. Monthly reporting of MBE participation is required in accordance with the terms and conditions of the CATS+ Master Contract by the 15th day of each month.**



- B. The TO Contractor shall provide a completed MBE Prime Contractor Paid/Unpaid MBE Invoice Report (Attachments 2-4A and 2-4B) to the TO Requesting Agency at the same time the invoice copy is sent.
 - C. The TO Contractor shall ensure that each MBE subcontractor provides a completed Subcontractor Paid/Unpaid MBE Invoice Report (Attachment 2-5).
 - D. Subcontractor reporting shall be sent directly from the subcontractor to the TO Requesting Agency. The TO Contractor shall e-mail all completed forms, copies of invoices and checks paid to the MBE directly to the TO Manager.
4. Add new TORFP Section 2.3.3, as follows:

2.13.13 FIXED PRICE INVOICE SUBMISSION PROCEDURE

This procedure consists of the following requirements and steps:

- A) A proper invoice shall identify “DHR” as the recipient and contain the following information: date of invoice, TO Agreement number, deliverable description (if applicable), deliverable number (e.g., “2.8.4.1.”), period of performance covered by the invoice, a total invoice amount, and a TO Contractor point of contact with telephone number.
- B) The TO Contractor shall e-mail the original of each invoice and signed DPAF (Attachment 9), for each resource and/or deliverable being invoiced to the TO Requesting Agency at the address listed above in section 2.13.2
- C) Invoices for final payment shall be clearly marked as “FINAL” and submitted when all work requirements have been completed and no further charges are to be incurred under the TO Agreement. In no event shall any invoice be submitted later than sixty (60) calendar days from the TO Agreement termination date.

Payment will only be made upon completion and acceptance of the DPAF

5. Add new language to TORFP Section 2.14, SUB TASK ORDER PROCESS as follows:

A Sub Task Order may be issued for either fixed price or time and materials (T&M) pricing. T&M Sub Task Orders will be issued in accordance with pre-approved Labor Categories with the fully loaded rates proposed in Attachment 1A and 1B.

6. **Revise TORFP Section 3.3, SUMMARY OF ATTACHMENTS, as follows:**
- No attachment forms shall be altered and signatures shall be clearly visible.
 - A. The following attachments shall be included with the TO Technical Proposal:

- ~~Attachment 2-D-1 and D-2~~ – (Attachment 2-1A) - MBE Utilization and Fair Solicitation Affidavit & MBE Participation Schedule
- Attachment 4 – Conflict of Interest Affidavit and Disclosure
- Attachment 5A and B – Labor Classification Personnel Resume Summaries
- Attachment 13 – Living Wage Affidavit of Agreement
- Attachment 15-V-1 – VSBE Utilization Form
- Attachment 16 – Certification Regarding Investments in Iran
- Attachment 20 – Certificate of HIPAA Compliance

B. The following attachments shall be included with the TO Financial Proposal:

- Attachment 1 **A and 1B** Price Sheets

7. Revise Section 3.4.1.D.1, TO TECHNICAL PROPOSAL as follows:

1. Submit completed Minority Business Enterprise Participation Affidavit (~~Attachments 2-D-1—D-7-2-1A~~)- (Attachment 2-1A).

8. Revise 3.4.1.G.2, TO TECHNICAL PROPOSAL as follows:

State of Maryland and/or other Governmental Experience: If applicable, the Master Contractor shall submit a list of all contracts it currently holds or has held within the past five years with any governmental entity ~~of the State of Maryland~~.

9. Revise TORFP Section 3.4.2, TO FINANCIAL PROPOSAL, as follows:

- A. A description of any assumptions on which the Master Contractor's TO Financial Proposal is based (Assumptions shall not constitute conditions, contingencies, or exceptions to the Price Sheet).
- B. ~~Attachments 1—Price Sheet~~, 1A and 1B ~~completed in PDF format~~ with all proposed labor categories, including all rates fully loaded. Master Contractors shall list all proposed resources by approved CATS+ labor categories in the Price Sheet. Prices shall be valid for 120 days.
- C. To be responsive to this TORFP, the Price Sheets (Attachments 1A and 1B) shall provide labor rates for all labor categories. Proposed rates are not to exceed the rates defined in the Master Contract for the Master Contract year(s) in effect at the time of the TO Proposal due date.

Note: Failure to specify a CATS+ labor category in the completed Price Sheet for each proposed resource will make the TO proposal non-responsive to this TORFP.



10. Revise TORFP Section 4.5, LIST OF ATTACHMENTS as follows:

Attachments <u>1A and 1B</u>	Price Sheets	Always Applicable	Submit with TO Financial Proposal
------------------------------	--------------	-------------------	-----------------------------------

Attachment 2	Minority Business Enterprise Participation (Attachments D-1 D-7 D-2-1A)	Applicable	Submit with TO Technical Proposal
--------------	--	------------	-----------------------------------

11. Replace Attachment 1 with new Attachments 1A and 1B.

12. Replace all MBE Attachments (Attachment 2 series) with new attachments.

Should you require clarification of the information provided in this Amendment, please contact me by email at richard.wright@maryland.gov or by phone at 410-238-1267.

By:
Richard Wright
Procurement Officer
Issued: December 2, 2014

AMENDMENT ACKNOWLEDGEMENT FORM

**CATS+ TORFP # OTHS/OTHS-14-015-S
Blanket Purchase Order #: N00B4400094
ENTERPRISE PROJECT MANAGEMENT OFFICE**

Amendment Acknowledgement:

The Offeror: _____ acknowledges receipt of Amendment No. 3 and is made aware of the changes contained therein. By signing this form the Offeror accepts the changes as part of the contract requirement.

Authorized Signature

Date

Note: This form must be signed and returned to the Procurement Officer by 2:00 p.m. on December 19, 2014.



**TASK ORDER REQUEST FOR PROPOSALS (TORFP)
STATE OF MARYLAND
DEPARTMENT OF HUMAN RESOURCES
OFFICE OF TECHNOLOGY FOR HUMAN SERVICES**

**OTHS/OTHS/14-015-S
ENTERPRISE PROJECT MANAGEMENT OFFICE (REVISED)**

**No. N00B4400094
AMENDMENT NO. 4**

February 4, 2015

Dear Master Contractors:

This Amendment is being issued to clarify certain information contained in the above named TORFP. All information contained herein is binding on all Master Contractors who respond to this TORFP. Specific parts of the TORFP have been amended. The changes are listed below. New language has been double underlined and marked in **bold (i.e. word)** and language that has been deleted has been marked with a strikethrough (i.e. ~~word~~). Master Contractors who submitted proposals to this TORFP shall submit the attached Amendment Acknowledgement Form by 2 p.m. local time, February 9, 2015

1. Revise TORFP Section 1.23 FEDERAL AND STATE ACCESS as follows:

The United States Department of Health and Human Services (HHS), **the United States Department of Agriculture (USDA)**, and DHR, or any of their duly authorized representatives, shall have access to the TO Contractor's documents, papers, and records which are directly pertinent for the purpose of making audit, examination, excerpts, and transcriptions for work performed under this Contract. The TO Contractor shall cooperate with all reviews and supply copies of any requested materials.

HHS, **USDA**, and the State of Maryland shall have royalty-free, non-exclusive and irrevocable license to reproduce, publish, or otherwise use, and to authorize others to do so, all application software including but not limited to all source and object code, instructions, files, and documentation which is required by the Contract. The TO Contractor claims no proprietary rights to the application software, files, databases, or other components of the application developed or modified specifically for the State under this TO Agreement. The State may grant to the Federal government a royalty-free, non-exclusive, and irrevocable license in such software, modifications and documentation designed, developed or installed in whole or part with Federal financial participation in accordance with Federal regulations at 45 C.F.R. Part 95.617. The provisions of this section shall be incorporated in any subcontract that relates to the subject matter of this article.

2. Add TORFP Section 1.25, REQUIRED FEDERAL ASSURANCES as follows:

1.25 REQUIRED FEDERAL ACCESS

By signing and submitting a proposal, the Master Contractor acknowledges that it shall comply with Federal Executive Order 11246 related to Equal Employment Opportunity, Section 306 of the Federal Clean Air Act, Section 508 of the Federal Clean Water Act, the Anti Lobbying Act, and the Americans with Disabilities Act. Additionally, the Master Contractor certifies that neither it nor its principals are debarred or suspended from Federal financial assistance programs and activities.

Should you require clarification of the information provided in this Amendment, please contact me by email at Leah.hinson@maryland.gov or by phone at 410-238-1339.

By: *Leah Hinson*
Procurement Officer
Issued: February 4, 2015

AMENDMENT ACKNOWLEDGEMENT FORM

**CATS+ TORFP # OTHS/OTHS-14-015-S
Blanket Purchase Order #: N00B4400094
ENTERPRISE PROJECT MANAGEMENT OFFICE**

Amendment Acknowledgement:

The Offeror: _____ acknowledges receipt of Amendment No. 4 and is made aware of the changes contained therein. By signing this form the Offeror accepts the changes as part of the contract requirement.

Authorized Signature

Date

Note: This form must be signed and returned to the Procurement Officer by 2:00 p.m. on February 9, 2015.