

Request for Resume (RFR) for Project Manager (Senior)

CATS+ Master Contract

All Master Contract Provisions Apply

Section 1 – General Information			
RFR Number: (Reference BPO Number)	N00B8400063 OTHS/OTHS -18-006-S		
Functional Area (Enter One Only)	10 - IT Management Consulting Services		
Labor Category/s			
<i>A single support staff or support groups of up to five members may be engaged for up to six months without renewal options. Awards for Major IT Development Project (MITDP)/Program Manager/Deputy PMs may have tenure of one base year with up to two optional years, or through the end of the project within the Master Contract term. An RFR is limited to only labor categories defined in the CATS+ RFP.</i>			
<i>Enter the labor category/s to be provided:</i>			
1. Project Manager (for a Senior Project Manager role)			
Anticipated Start Date	October 20, 2017		
Duration of Assignment	Two (2) year base period: October 20, 2017 – October 19, 2019 One (1) one year renewal option: October 20, 2019 - October 19, 2020		
Designated Small Business Reserve?(SBR): (Enter “Yes” or “No”)	Yes		
MBE Goal, if applicable			0%
Issue Date: mm/dd/yyyy	8/3/2017	Due Date: mm/dd/yyyy	8/16/2017
		Time (EST): 00:00 am/pm	2:00 pm
Place of Performance:	Department of Human Services(DHS)- -Office of Technology for Human Services (OTHS) 1100 Eastern Boulevard Essex, MD 21221		
Special Instructions: (e.g. interview information, attachments, etc.)	1. DHS intends to award this RFR for one (1) Project Manager resource to a Master Contractor that proposes a candidate that can best satisfy the RFR requirements. Master Contractors may submit only one (1) resume for consideration.		

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	<ol style="list-style-type: none">2. In the event that more than ten (10) responsive proposals are received, the TO Procurement Officer may elect to follow a down-select process as follows:<ol style="list-style-type: none">A. An initial review will be performed for all technically qualified proposals based on evaluation criterion 1 through 5 in Section 5 of the RFR.B. Proposals will be ranked from highest to lowest for technical merit based on evaluation criterion 1 through 5 in Section 5.C. No less than the top five (5) ranked Offerors will be notified of interviews. All other Offerors will be notified of non-selection for this RFR.3. The in-person interviews will be conducted at 1100 Eastern Boulevard, Essex, MD 21221. The specific date and time will be furnished to the top five (5) ranked Master Contractors. Candidates submitting resumes must be available for an interview on the assigned date. Interviews will be conducted using a standardized set of interview questions for all candidates.
Security Requirements (if applicable):	<ol style="list-style-type: none">1. Selected personnel shall pass a background check.2. Unless otherwise determined by DHS, and in compliance with the below, the selected personnel shall provide their own laptop (hardware) and software. The selected personnel's hardware and software shall meet or exceed DHS's standards for virus protection and security. All deliverables produced shall be produced in a version of software that is compatible with DHS's version. For example Microsoft Office 2003 - MS Word, PowerPoint, Excel, and Adobe Pro Version 7.3. When visiting State facilities, the selected personnel shall adhere to all State security requirements. This includes presenting photo ID when inside State facilities and presenting ID upon request at any time. The selected personnel shall:<ol style="list-style-type: none">A. Abide by the State's Security policies and procedures in force at each site.B. Comply with the requirements of the State of Maryland Department of Information Technology Security (DoIT) Security Policies and Standards, including cooperation and coordination with State and federal auditors, DoIT and other compliance officers. DoIT's policies can be found at http://doit.maryland.gov/support/pages/securitypolicies.aspx, and include topics such as:

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- Information Security Policy v3.1
- Cyber Security Evaluation Tool (CSET)
- Technical Security Plan Template
- Mobile Device Security Policy

- C. Agree to enter into a connectivity agreement with DHS. The agreement shall include, but not be limited to, the following:
1. Refraining from connecting any non-State owned or unapproved computers to any State network without prior permission and assurances that the State security standards are met. Commercially available diagnostic tools may receive a blanket approval for use on the network, State owned PCs or other equipment as necessary to diagnose and resolve incidents.
 2. Meeting or exceeding State security standards.
 3. Once established, not modifying security provisions for firewalls, client, and server computers without written State approval.
 4. Maintaining current updated virus software and virus definition files that are enabled to perform real time scans on all selected personnel supplied hardware.
 5. Disallowing dialup modem use while attached to the State network.
 6. Refraining from installing or utilizing remote control or file sharing software unless explicitly approved by the State in writing.
 7. Signing any documents that are reasonably necessary to keep the Contractor in compliance with the State IT Security Policies.

Failure to comply with State security requirements on the part of the selected personnel will be regarded as a breach of the Contract and may be followed by termination for default.

Invoicing Instructions

1. Invoices shall be submitted by the 15th business day of the month following the month the services were provided and shall be accompanied by status reports that account for all hours billed and the activity that was being performed. Upon verification and acceptance of the invoices, payment will be made to the Master Contractor.
2. The Master Contractor shall invoice as follows:
 1. Annual Labor Rate: Task Orders awarded at the Annual Labor Rate shall be invoiced monthly for 1/12 the Annual Labor Rate.
 2. Hourly Labor Rate: Task Orders awarded at the Hourly Labor Rate shall be invoiced monthly for

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actual hours x Labor Rate.

3. Except as provided herein, payments to the Master Contractor shall be governed by the terms and conditions defined in the CATS+ Master Contract. Invoices for payment shall contain the Master Contractor's Federal Employer Identification Number (FEIN), as well as the information described below, and must be submitted to Sharon Garey, AFS Manager, for payment approval.
 - A. The DHS/OTHS, labor category, associated Contract Agreement number, date of invoice, period of performance covered by the invoice, and a Contractor point of contact with telephone number.
 - B. An original of each invoice and supporting documentation submitted for payment to:

Attention: Ms. Sharon Garey, AFS Manager
 Department of Human Services/OTHS
 1100 Eastern Boulevard
 Essex, MD 21221
4. 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 Contract. In no event shall any invoice be submitted later than sixty (60) calendar days from the Contract termination date.

Section 2 – Agency Procurement Officer (PO) Information

Agency / Division Name:	Maryland Department of Human Services, Office of Technology for Human Services		
Agency PO Name:	Ms. Leah Hinson	Agency PO Phone Number:	410-238-1339
Agency PO Email Address:	Leah.Hinson@Maryland.Gov	Agency PO Fax:	410-238-1941
Agency PO Mailing Address:	Department of Human Services/OTHS 1100 Eastern Boulevard Essex, MD 21221		

Section 3 – Scope of Work

Agency / Project Background

The AFS is a computerized fiscal tracking system that is used statewide by local finance offices, allowing users to perform a number of accounting tasks. The system allows users to setup, print, and track payments for various vendors—including payments to foster care providers—while maintaining a history of all financial transactions. The system also provides the capability to generate a number of fiscal reports including the 302A for assistance and the General Ledger. Additionally, the system also produces annual 1099 data that is subsequently uploaded into the State’s Financial Management Information System (FMIS) via a manual batch load process.

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The legacy AFS was developed using Delphi, a programming language based on object Pascal programming methods. While Delphi was regarded as a very promising development platform that provided rich connectivity options to relational databases, it became increasingly restrictive and inflexible for the State to maintain. Requests for minor application changes were often costly to implement, and specialized programming skills *were* required to accommodate even minor requests for modification. Given the limitation of the technology suite upon which the legacy AFS application was built, it is not able to easily adjust to new workflows and the adoption of newer technologies that will provide the State scalability and room for growth.

To address these concerns, the State initiated the legacy AFS modernization project through the OTHS. The aim of the project is to deploy a scalable application leveraging more robust application programming technologies, using proven field-tested agile principles, tools, and methods. The Sr. PM will transition into where the incumbent's contract ends which is during the award of the AFS solution. The transitioning entails the shift from a traditional SDLC to an agile methodology for the solution's implementation.

The implementation of the project will ultimately provide the following primary benefits:

1. Reduced maintenance costs associated with the upkeep of a legacy application and supporting infrastructure environments;
2. Improved check processing workflows and the reduction of manual processes that sometimes result in departmental inefficiencies and compromised data integrity;
3. The deployment of a scalable application with a modern and flexible user interface; and
4. Advanced reporting capabilities that provide standard built-in reports, and the ability to generate user customizable ad-hoc financial reports

Ultimately, the modernization project will include delivery of a robust financial management solution that provides advanced security, performance, and improved user experience, in accordance with the State's business need and requirements.

The selected Project Manager's primary focus will be to provide the oversight and governance required to deliver the intended solutions identified through this RFR. The execution of the expected oversight and governance can be achieved through the application of agile practices. Agile practices emphasize the following principles:

1. Deliver more value, quickly
2. Focus on small, frequent capability releases
3. Enhance communication and transparency
4. Value of working software over comprehensive documentation
5. Respond rapidly to changes in priorities, operations, technology, and budgets
6. Actively involving users throughout development to ensure high operational value

Project's Current Status: The RFP for the Automated Fiscal System (AFS) Modernization Project was issued 12/28/16 with a closing date of 4/12/17. An evaluation is currently being completed for a recommended awardee.

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Minimum Qualifications	
<p>For minimum qualifications, see the labor category description in the CATS+ RFP for the subject RFR labor category. In addition, qualified candidates <u>must</u> meet the minimum qualifications specified below. Candidates that do not meet minimum qualifications will be deemed not reasonably susceptible for award and will not progress to full evaluation.</p>	
Labor Category/s (From Section 1 Above)	Minimum Qualifications
<p>1. Project Manager (Senior Project Manager role)</p>	<p>a. Education: Bachelor’s Degree from an accredited college or university in Engineering, Computer Science, Information Systems, Business or other related discipline.</p> <p>b. General Experience: At least five (5) years of experience in project management.</p> <p>c. Specialized Experience: At least five (5) years of experience in managing IT related projects and must demonstrate a leadership role in at least three successful projects that were delivered on time and on budget.</p> <p>Experience with a, managing, state or city in a state or city agency financial or budgeting project.</p> <p>Experience managing projects using agile processes and practices .</p> <p>Understanding of and demonstrated experience in using project management tools such as Jira/Greenhopper, Rally, VersionOne or equivalent. The Agency currently uses VersionOne as its governance tool.</p>
Preferred Qualifications	
<p>The additional Experience/Knowledge/Skills listed below are preferred by the State.</p>	
<p>2. Project Manager (Senior Project Manager role)</p>	<p>Solid understanding of software development life cycle models as well as knowledge of both agile and traditional project management principles and practices and the ability to blend them together in the right proportions to fit a project and business environment.</p> <p>A proven track record of successfully implementing software or web development projects using agile.</p> <p>Experience with SCRUM/agile methodologies.</p> <p>Scaled Agilist (SA), Project Management Institute/Agile Certified Practitioner, Certified Scrum Master, or equivalent.</p>

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Experience overseeing multi-function project teams with at least 10-15 team members including developers, business analysts, and quality assurance personnel.

Sufficient level of technical background to provide highly-credible leadership to development teams and to be able to accurately and objectively evaluate complex project risks and issues.

Ability to provide leadership to business analysts and collaborate with customers and develop strategies and solutions of high business value.

Prior experience in working with the State of Maryland and/or DoIT on technology projects.

Section 4 - Required Submissions

NOTE:

- Master Contractors may propose only one candidate for each position requested.
- Master Contractors electing not to propose in response to the RFR must submit a “Master Contractor Feedback Form” via the “Master Contractor Login” on the CATS+ web site.
- Master Contractors proposing in response to the RFR must submit the documents below as separate files contained in two separate emails as follows:

Email 1 of 2 with “Technical”: Master Contractor Name, RFR number, & candidate name in the subject line

- Resume for each labor category described in the RFR (Attachment 1)
- Three (3) current references that can be contacted for performance verification of the submitted candidate’s work experience and skills. Telephone number and email address of reference is needed.
- Conflict of Interest Affidavit (Attachment G in the CATS+ RFP)
- Living Wage Affidavit (Attachment I in the CATS+ RFP)
- Certification Regarding Investments in Iran (Attachment 4 of this RFR)
- Any other required documentation to demonstrate meeting minimum qualifications.

Email 2 of 2 as a password protected file with “Financial”: Master Contractor Name, RFR number, & candidate name in the subject line. The password must be unique for each candidate e-mail.

- Price Proposal (Attachment 2)

The PO will contact Master Contractors to obtain the password to the financial proposal for those candidates that are deemed reasonably susceptible for award. Master Contractors who cannot provide a password that opens the file will be considered not susceptible for award. Subsequent submissions of financial content will not be allowed.

- Copy of current certification for Scaled Agilist (SA), Project Management Institute/Agile Certified Practitioner, Certified Scrum Master, or equivalent.

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Section 5 – Evaluation Criteria –

Candidates meeting the Minimum Qualifications listed in Section 3 above will be evaluated for overall best value, as follows:

(The evaluation criteria is listed in descending order of importance)

1. Candidate’s understanding of how to manage application development to meet requirements, reportings, interfaces, data conversion, and added functionality.
2. Candidate’s knowledge and understanding of common challenges to custom, SaaS or COTS integration.
3. Candidate’s working knowledge and understanding of the agile SDLC from system development through operations and maintenance.
4. Knowledge of agile IT project management practices.
5. Training and education.
6. References.
7. Price.

Basis for Award Recommendation

The Task Order PO will recommend award to the Master Contractor whose proposal is determined to be the most advantageous to the State, considering price and the evaluation factors set forth in the RFR. In this evaluation, technical merit will be given greater weight. The Task Order PO will initiate and deliver a Task Order Agreement to the selected Master Contractor. **Master Contractors should be aware that if selected, State law regarding conflict of interest may prevent future participation in procurements related to the RFR Scope of Work, depending upon specific circumstances.**

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ATTACHMENT 1

RFR RESUME FORM

RFR # N00B8400063

Instructions: Enter resume information in the fields below; do not submit other resume formats. Submit only one resume per Labor Category described in Section 1 of the RFR. If the RFR requests multiple Labor Categories, use a separate resume form for each Labor Category.

Labor Category **Project Manager (Senior Project Manager role)**

Candidate Name:

Master Contractor:

A. Education / Training

Institution Name / City / State	Degree / Certification	Year Completed	Field Of Study
<add lines as needed>			

B. Relevant Work Experience

Describe work experience relevant to the Duties / Responsibilities and Minimum Experience / Knowledge / Skill described in Section 3 of the RFR. Starts with the most recent experience first; do not include non-relevant experience.

[Organization] *Description of Work...*
[Title / Role]
[Period of Employment / Work]
[Location]

[Organization] *Description of Work...*
[Title / Role]
[Period of Employment / Work]

<add lines as needed>

C. Employment History

List employment history, starting with the most recent employment first

Start and End Dates	Job Title or Position	Organization Name	Reason for Leaving
<add lines as needed>			

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D. References

List persons the State may contact as employment references

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

LABOR CATEGORY PERSONNEL RESUME SUMMARY

(ATTACHMENT 1 CONTINUED)

*“Candidate Relevant Experience” section must be filled out. Do not enter “see resume” as a response.

Proposed Individual’s Name/Company:	How does the proposed individual meet each requirement?
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LABOR CATEGORY TITLE – PROJECT MANAGER (Senior Project Manager role)

Requirement	Candidate Relevant Experience *
Education: Minimum: Bachelor’s Degree from an accredited college or university in Engineering, Computer Science, Information Systems, Business or other related discipline.	Education: 1.
General Experience: Minimum: At least five (5) years of experience in project management.	General Experience: 1.
Specialized Experience: Minimum: At least five (5) years of experience in managing IT related projects and must demonstrate a leadership role in at least three successful projects that were delivered on time and on budget. Experience with a, managing, state or city in a state or city agency financial or budgeting project. Experience managing projects using agile processes and practices . Understanding of and demonstrated experience in using project management tools such as	Specialized Experience: 1.

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Signature

Date

Instruction: Sign each form.

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ATTACHMENT 2

PRICE PROPOSAL

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(This form is to be filled out by Master Contractors - Submit as the Financial Response with password protection)

Period 1 (one year)				
CATS+ Labor Category	A	B	C	D
	Fully Loaded Annual Labor Rate*	Fully Loaded Hourly Labor Rate	Evaluation Hours	PERIOD 1 Extended Price (B x C)
Project Manager (Senior Project Manager Role)	\$	\$	2000	\$
Total Period 1 Evaluation Price:				
Period 2 (one year)				
CATS+ Labor Category	A	B	C	D
	Fully Loaded Annual Labor Rate*	Fully Loaded Hourly Labor Rate	Evaluation Hours	PERIOD 2 Extended Price (B x C)
Project Manager (Senior Project Manager Role)	\$	\$	2000	\$
Total Period 2 Evaluation Price:				
Period 3 (one year)				
CATS+ Labor Category	A	B	C	D
	Fully Loaded Annual Labor Rate*	Fully Loaded Hourly Labor Rate	Evaluation Hours	PERIOD 3 Extended Price (B x C)
Project Manager (Senior Project Manager Role)	\$	\$	2000	\$
Total Period 3 Evaluation Price:				
Total RFR Price (Sum of Periods 1-3 Prices):				\$

Authorized Individual Name

Company Name

Title

Company Tax ID #

Signature

Date

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*The Agency reserves the right to award each individual position at either the proposed Annual Labor Rate or proposed Hourly Labor Rate. The Annual Labor Rate requires a minimum of 2000 hours worked annually. The Hourly Labor Rate cannot exceed the Master Contract rate, but may be lower. Both rates must be fully loaded, all inclusive, and shall include all direct and indirect costs for the Master Contractor to perform under the TOA. Evaluation Hours are for evaluation purposes only and do not represent actual hours to be worked or invoiced.

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<p>ATTACHMENT 3 RFR # N00B8400063 PROJECT MANAGER (SENIOR PROJECT MANAGER ROLE)</p> <p>DUTIES & RESPONSIBILITIES</p>	
<p>1. ROLE DEFINITIONS The purpose of this section is to distinguish among the roles interacting with the Project Manager procured through this RFR.</p>	
A.	Task Order (TO) Procurement Officer – State staff person responsible for managing the RFR process up to the point of TO award.
B.	TO Manager – State staff person who oversees the Project Manager’s work performance and administers the TO once it is awarded.
C.	TO Contractor – The CATS+ Master Contractor awarded a TO as a result of this RFR. The TO Contractor shall provide the Project Manager resource and be accountable for the Project Manager’s work performance under the TO.
D.	Project Manager (Senior Project Manager role) – The person provided by the TO Contractor as a result of this RFR. The Project Manager is responsible for overall project planning and execution. The Project Manager is responsible for performing the duties and responsibilities described in Attachment 3, and for completing all assigned tasks and deliverables under the TO. The Project Manager reports directly to the TO Manager and shall oversee and direct the Project Team made up of State and contractual personnel.
E.	Other Project Contractors – The Contractors responsible for project implementation, including their project manager and other personnel assigned to the project. The Contractors report to the Project Manager for project purposes with oversight by the TO Manager.
<p>2. PROJECT MANAGER (Senior Project Manager role) DUTIES AND RESPONSIBILITIES</p> <p>A Project Manager is responsible for planning, leading, organizing, and motivating agile project teams to achieve a high level of performance and quality in delivering agile projects that provide exceptional business value to users. <u>The Project Manager shall report to the TO Manager and perform the tasks described in the table below and shall be capable of performing all assigned tasks with self-sufficiency and minimal guidance from the TO Manager.</u></p>	

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Project Manager (Senior Project Manager role) Project Management Duties	
2.1	The Project Manager will be responsible for the management and execution of all project related activities including, but not limited to: a) on-boarding of project resources, b) implementation of technology solutions, c) oversight of vendor activities related to the Automated Fiscal System (AFS) Modernization Project, d) delivery of all associated deliverables including data migration and training.
2.2	Become thoroughly knowledgeable on all aspects of the AFS Project.
2.3	<p>Manage updating of the Requirements Traceability Matrix (RTM) that provides a numbering system for all project requirements for traceability through testing. The RTM shall include test scenarios and acceptance criteria for all technical and functional requirements.</p> <ul style="list-style-type: none"> • Ensure that RTM updates are in conjunction with Program Increment and/or Sprint Planning meeting to support feature and user story development. • Work closely with the project team and any contractors to review and update detailed project requirements. Requirements activities may include: <ul style="list-style-type: none"> – Stakeholder interviews; – Documenting before and after business processes; – Review of existing requirements documentation; –
2.4	Project Planning and Management – Define project scope and schedule while focusing on regular and timely delivery of value; organize and lead project status and working meetings; prepare and distribute progress reports; manage risks and issues; correct deviations from plans; and perform delivery planning for assigned projects.
2.5	Team Management – Assist in team development while holding teams accountable for their commitments, removing roadblocks to their work; leveraging organizational resources to improve capacity for project work; and mentoring and developing team members.
2.6	Product Owner Support – Support the Product Owner in managing customer expectations for project deliverables, managing stakeholder communications, and helping to implement an effective system of project governance.
2.7	Process Management and Improvement – Define and manage a well-defined project management process and champion ongoing process improvement initiatives to implement best practices for agile Project Management.
2.8	Team building – promote empowerment of the team, ensure that each team member is fully engaged in the project and making a meaningful contribution, and encourage a sustainable pace with high-levels of quality for the team.
2.9	Conduct a formal agile assessment of the workforce in coordination with leadership to define the current state of agile adoption within the organization and determine the readiness.
2.10	Deliver an agile transformation roadmap to move from current state to a desired state. Plan shall include tangible steps to move from the current state to the desired state.

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2.11	Conduct meetings with the team to ensure an understanding of current practices and methods used.
2.12	Perform assessment and report on how to improve current organizational program.
2.13	Aid the implementation and facilitate use of agile tools, guidelines and metrics seeking to achieve a standardized approach to agile team project execution.
2.14	<u>Agile Investment and Impact Report</u> - Draft an Agile Investment and Impact Report that describes the actual outcomes of the Agency’s agile program effort to include the outcomes against the approved plan, goals and objectives. This report will also identify and recommend candidate improvement objectives and activities for each of the projects to support continuation of the agile effort.
2.15	<u>Agile Maturity Assessment</u> - Review and report on the agile program and process to determine the current state of agile maturity within the Agency. This review shall specifically address the project and program teams; Integrated Program Teams; stakeholders’ involvement; organization, processes and organizational structure; and tools at both the Project and Program Office levels. The Project Manager shall document their findings and the current state of agile maturity of the Agency. Following completion of the agile maturity review and assessment, the Project Manager shall draft an Agile Assessment Report that outlines findings in terms of people, processes, tools and technology portfolio, to include identification of strengths.
2.16	General Management Activities – The Project Manager is responsible for the overall cost, control, adherence to schedules, and technical quality of work; support any needed requirements reviews and procurement support for implementation solicitations
2.17	The Project Manager shall propose and conduct periodic discussions (both formal and informal, telecom and face-to-face) with Agency stakeholders (and/or delegates) in the form of Technical Exchange Meetings, collaborative development sessions, program reviews, design reviews, etc., as required. The Project Manager shall create meeting minutes summarizing the discussions held in the meetings.
2.18	The Project Manager shall prepare and provide Technical Analysis Reports as directed by the government to support discussions.
2.19	The Project Manager shall continue to work with Central Budget and Finance representatives as well as Local Department representatives and stakeholders on change management activities relating to AFS. Including, but not limited to: <ul style="list-style-type: none"> <input type="checkbox"/> Building buy-in for the change(s); (in process) <input type="checkbox"/> Anchoring the change(s) in business operations; <input type="checkbox"/> Ensuring that the people in the organization are ready, willing, and able to adopt the change(s); and <input type="checkbox"/> Managing and measuring the change(s) so that the change(s) implemented are sustained and the desired benefits of the changes are realized.
2.20	Function as a liaison between Agency personnel, project stakeholders and any Contractors.

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2.21	Perform other project-related duties as assigned by TO Manager or Department.
3. REQUIRED PROJECT POLICIES, GUIDELINES AND METHODOLOGIES	
<p>The Project Manager shall keep informed of and comply with all applicable laws, regulations, policies, standards and guidelines affecting information technology projects applicable to activities and obligations under the TO Agreement, as those laws, policies, standards and guidelines may be amended from time to time. The Project Manager shall adhere to and remain abreast of current, new, and revised laws, regulations, policies, standards and guidelines affecting project execution and it shall obtain and maintain, at its expense, all licenses, permits, insurance, and governmental approvals, if any, necessary to the performance of its obligations under the TO Agreement. These may include, but are not limited to:</p>	
A.	<p>The State's Agile SDLC methodology at: http://doit.maryland.gov/SDLC/Pages/agile-sdlc.aspx</p>
B.	<p>The State's IT Security Policy and Standards at: www.DoIT.maryland.gov - keyword: Security Policy.</p>
C.	<p>The State's IT Project Oversight at: www.DoIT.maryland.gov - keyword: IT Project Oversight.</p>
D.	<p>The State of Maryland Enterprise Architecture at www.DoIT.maryland.gov - keyword: MTAf (Maryland Technical Architecture Framework).</p>
4. SUBSTITUTION OF PERSONNEL	
A.	<p><u>DIRECTED PERSONNEL REPLACEMENT</u></p> <p>A. The Agency TO Manager may direct the Master Contractor to replace any contractor personnel who, in the sole discretion of the TO Manager, are perceived as being unqualified, non-productive, unable to fully perform the job duties, disruptive, or known, or reasonably believed, to have committed a major infraction(s) of law or Agency, Contract, or RFR requirement.</p> <p>B. If deemed appropriate in the discretion of the TO Manager, the TO Manager shall give written notice of any personnel performance issues to the Master Contractor, describing the problem and delineating the remediation requirement(s). The Master Contractor shall provide a written Remediation Plan within three (3) days of the date of the notice. If the TO Manager rejects the Remediation Plan, the Master Contractor shall revise and resubmit the plan to the TO Manager within five (5) days of the rejection, or in the timeframe set forth by the TO Manager in writing. Once a Remediation Plan has been accepted in writing by the TO Manager, the Master Contractor shall immediately implement the Remediation Plan.</p> <p>C. Should performance issues persist despite the approved Remediation Plan, the TO Manager will give written notice of the continuing performance issues and either request a new Remediation Plan within a specified time limit or direct the removal and replacement of the contractor personnel whose performance is at issue. A request for a new Remediation Plan will follow the procedure described in Paragraph B.</p> <p>D. In circumstances of directed removal, the Master Contractor shall provide a suitable replacement for TO Manager approval within fifteen (15) days of date of the notification of directed removal, or the actual removal, whichever occurs first. However, if the TO Manager determines that the State's best interests require removal</p>

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	<p>of the contractor personnel with less than fifteen (15) days' notice, the TO Manager can direct removal in shorter timeframe, including immediate removal.</p> <p>E. Normally, a directed personnel replacement will occur only after prior notification of problems with requested remediation, as described above. However, the TO Manager reserves the right to direct immediate personnel replacement without utilizing the remediation procedure described above.</p> <p>F. Replacement or substitution of contractor personnel under this section shall be in addition to, and not in lieu of, the State's remedies under the RFR or which otherwise may be available at law or in equity.</p>
B.	<p><u>SUBSTITUTION OF PERSONNEL PRIOR TO RFR EXECUTION (AND UP TO 30 DAYS AFTER RFR EXECUTION)</u></p> <p>Prior to Task Order Execution or within thirty (30) days after Task Order Execution, the Offeror may substitute proposed candidate only under the following circumstances: vacancy occurs due to the sudden termination, resignation, or approved leave of absence due to an Extraordinary Personnel Event, or death of such personnel. To qualify for such substitution, the Offeror must describe to the State's satisfaction the event necessitating substitution and must demonstrate that the originally proposed personnel are full-time employees with the Offeror (subcontractors, temporary staff or 1099 contractors do not qualify). Proposed substitutions shall be of equal caliber or higher, in the State's sole discretion. Proposed substitutes deemed by the State to be less qualified than the originally proposed individual may be grounds for pre-award disqualification or post-award termination.</p> <p>An Extraordinary Personnel Event – means Leave under the Family Medical Leave Act; an incapacitating injury or incapacitating illness; or other circumstances that in the sole discretion of the State warrant an extended leave of absence, such as extended jury duty or extended military service.</p>
C.	<p><u>SUBSTITUTION AFTER 30 DAYS POST RFR EXECUTION</u></p> <p>The procedure for substituting personnel after RFR execution is as follows:</p> <ol style="list-style-type: none"> 1. The Master Contractor may not substitute personnel without the prior approval of the Agency TO Manager. 2. To replace any personnel, the Master Contractor shall submit resumes of the proposed individual specifying the intended approved labor category. Any proposed substitute personnel shall have qualifications equal to or better than those of the replaced personnel. 3. Proposed substitute individual shall be approved by the Agency TO Manager. The Agency TO Manager shall have the option to interview the proposed substitute personnel and may require that such interviews be in person. After the interview, the Agency TO Manager shall notify the Master Contractor of acceptance or denial of the requested substitution. If no acceptable substitute personnel is proposed within the time frame established by the Agency TO Manager, the TO Agreement may be cancelled.
5. WORK HOURS	
A.	The Project Manager will work at minimum eight-hour day between the hours of 8:00 AM and 7:00 PM, Monday through Friday, including when directed by TO Manager

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	or Department, on evenings, weekends, State holidays, Service Reduction days or other office closures.		
6. PROJECT MANAGER DELIVERABLES AND TIME OF PERFORMANCE			
<i>Note – for each of the written deliverables below, ongoing quality will be a factor in the Monthly Performance Rating described in Section 4 above.</i>			
ID #	Deliverable Description	Acceptance Criteria	Time of Performance
6.1	Charter	Includes the vision, defines the “Why” of the project or the reason for the project’s existence; the mission the “What” of the project and what will be done in the project to achieve its higher purpose; and success criteria.	TBD
6.2	Vision Statement	Should include a quick summary to communicate how the solution supports the organization's strategies and articulate the goals for the solution.	TBD
6.3	Definition of Done	Drives the quality of work and is used to assess when a User Story has been completed.	TBD
6.4	Responsibility Matrix	Describes the participation by various roles in completing tasks or deliverables for a project or business process.	TBD
6.5	Epic Solution Document – Lightweight Business Case	Describes the results of initial analysis, includes description, success criteria, estimates of implementation and program impact	TBD
6.6	Master Schedule/Roadmap	This schedule should include all project management, agency and contractor activities in sufficient detail to manage the project. <ul style="list-style-type: none"> • The schedule should include milestones, deliverables, periods of performance, degrees of completion, and assigned resources for all project activities. • The activities duration in the master schedule should be at appropriate level of granularity to manage and track project progress. • Oversee appropriate updates to the Project Management Plan and related project components as outlined in the SDLC. 	TBD
6.7	Risk Management Plan and Risk	At a minimum the RMP shall: <ul style="list-style-type: none"> • Identify and prioritize potential risks to 	Registry updated bi-weekly; Plan

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	Registry (RMP)	<p>successful completion of the SDLC Phases.</p> <ul style="list-style-type: none"> • Incorporate pertinent risk information found in the Master Project Status Report • Include a Risk Registry of all project risks that will be updated throughout the project. 	updated quarterly or as directed by the TO Manager
6.8	Cost Management Plan and Cost Reporting	MS Word document (or agreed upon format) that establishes the activities and criteria for planning, structuring and controlling project costs. The Cost Management Plan and Cost Reporting document should comply with Maryland's SDLC, the agencies governance model.	Cost Reporting document updated bi-weekly; Plan updated quarterly or as directed by the TO Manager
6.9	Requirements Traceability Matrix (RTM) Development and Updates	<p>RTM describes and provides a numbering system for all project requirements for traceability through testing. The RTM process is part of the Quality Assurance Plan</p> <ul style="list-style-type: none"> • The RTM shall include test scenarios and acceptance criteria for all technical and functional requirements. • Ensure that the TO Contractor's team participates in requirements development as needed and traces requirements through testing and implementation via updates to the RTM. • Ensure that RTM updates are in conjunction with weekly requirements / design reviews. • Work closely with the project team and any contractors to develop or review and update detailed project requirements. Requirements activities may include: <ul style="list-style-type: none"> – Stakeholder interviews – Documenting before and after business processes – Review of existing requirements documentation – Joint Application Development (JAD) sessions – COTS software “gap fit analysis” – Demonstrations of existing similar systems (benchmarking) – Requirements walkthroughs 	Updated bi-weekly or as directed by the TO Manager
6.10	Agile Maturity Assessment	Develop an initial agile maturity assessment/matrix. Review and report on	Updated weekly? Or as directed by

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		the progress of agile project and ongoing efforts to show maturity throughout the process	the TO Manager
6.11		Software Development Iterations/Program Increments/Sprint Planning - Establish and follow best practices for agile development. Develop a schedule of software iterations/increments and sprints based on Product Owner priorities and user stories.	Updated weekly? Or as directed by the TO Manager
6.12		Project Manager Status Report and Timesheet- MS Word document (or mutually agreed upon document) that captures and tracks ongoing project management activities and status. The report will capture activities completed in the past reporting period, activities planned for the following reporting period, and the completion status of project deliverables. The report will describe issues and impediments on the project and the status of the efforts to resolve issues/impediments	At least bi-weekly or as directed by the TO Manager
6.13		Master Status Report-MS Word document (or mutually agreed upon document) that captures and tracks ongoing project activities and status. The report will capture activities completed in the past reporting period, activities planned for the following reporting activities, the completion status of project deliverables and a status of project costs (planned vs. actual). The report will describe issues and impediments on the project and the status of the efforts to resolve issues/impediments and mitigate risks. The report will have sections describing necessary updates to the Master Schedule/Roadmap and Risk Registry. The report will document lessons learned from the project and any other pertinent status information.	At least bi-weekly or as directed by the TO Manager
6.14	Procurement Management Plan	Describes how a project team will acquire goods and services. Information within this document can be used as an input when completing the specific acquisition plan for each purchase.	At least bi-weekly or as directed by the TO Manager
6.15	As mentioned under PM	Deliver an agile transformation roadmap Draft an Agile Investment and Impact	At least bi-weekly or as

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	Responsibilities	Report Draft an Agile Assessment Report	directed by the TO Manager
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