TO: Offerors

FROM: June Dwyer
              Procurement Specialist

RE: **ADDENDUM 1**
              TORFP NO. R00B4400138
              Database Management Specialist

DATE: February 25, 2015

Please review all of the information for this addendum and take this into consideration when submitting your proposals.

Included in this addendum is:

- Pre-proposal attendance list- 3 pages
- Transcript of Pre-Proposal conference – 30 pages
- Questions and Answers- 4 pages
- Renumbered sections 2 and 3 – TORFP pages 13 - 25

Please contact me if you do not receive all of the attachments listed above.

Thank you. All correspondence should be sent to **june.dwyer@maryland.gov**.

You must acknowledge all addenda with your proposal. Please submit page 2.

NOTE: NEW DUE DATE-MARCH 5, 2015 AT 2:00 PM

ADDENDUM 1
TORFP NO. R00B4400138
Database Management Specialist

Received By_____
(Print Name)

Signature_____Date_____

Vendor_____

Telephone No._____ Email: _____

(on back)

MARYLAND STATE DEPARTMENT OF EDUCATION

RFP #R00B4400138
Senior Database Management Specialist

(ATTENDANCE SHEET)

PRE-PROPOSAL CONFERENCE DATE:		February 20, 2015		8TH FLOOR CONF. RM. #8
NAME (Please Print)	**ORGANIZATION**	**ADDRESS**	**TELEPHONE #**	**FAX#** / **E-MAIL**
NARAYAN ATHREYA	iCUBE SYSTEMS Inc.	8280 Willow Springs Corp. Dr. Suite 600 FAIRFAX, VA 22031	703-222-3636	NVATHREYA@iCUBESYS.com
Mary Kay McGaughey	Soft-Con Enterprises, Inc.	6505 Belcrest Road Suite 120 Hyattsville, MD 20782	301-429 0075	mkmcgaughey@ Softcon1.com
Walter Borkowsky	Netorian	210 Research Blvd, Suite 160 Aberdeen, MD 21001	443-619-3945	wborkowsky@ netorian.com
Mohit (phone) Goyal	Elegant Enterprise Wide Solutions			mgoyal@elegantsolutions.us
Laurie Hess	Bith group.	113 W. monument	410-962-1188	lhess@ bithgroup.com
Theodore Williams (phone)	AimStar Information Solutions Inc		410 730 4806	twilliams@aimstar.com
Pete Cerveum	MSDE		410-767-8108	
June Dwyer	MSDE		410-767-0116	june.dwyer@ maryland.gov
Mark Wagner	Bay-Tek	780 Elkridge Landing Rd Suite 206	443-677-6728	mwagner@bay-tek.net

Sameera Adithan   Account Executive, Infojini, Inc

891 Elkridge Landing Road
        Suite 190
Linthicum Heights, MD 21090
      443-908-0420

SAMEERA.ADITHAM@ INFOJINICONSULTING.COM

RFP #R00B4400138
Senior Database Management Specialist

(ATTENDANCE SHEET)

PRE-PROPOSAL CONFERENCE DATE:		February 20, 2015		8TH FLOOR CONF. RM. #8

NAME (Please Print)	ORGANIZATION	ADDRESS	TELEPHONE #	FAX# / E-MAIL
Verna Wilkes (phone)	SysCom Inc		410 539-3737 x1010	VWilkes@the Syscom.com
Tracey Newell (phone)	Delmock		301 772-9400	trewell@delmock.com
Deepak Mehta (phone)	Elutek		301-838-0060	dmehta@email @ gmail.com
Harry Hans (phone)	Sona Networks		410 329 1811	hhans@sonanetworks.com

1

MARYLAND STATE DEPARTMENT OF EDUCATION

CONSULTING AND TECHNICAL SERVICES + (CATS+)

Task Order Request for Proposals (TORFP)

CATS+ TORFP #R00B4400138

Senior Database Management Specialist

Friday, February 20, 2015

9:00 a.m.

June Dwyer, presiding

Procurement Officer

Baltimore, Maryland

gm

FYI

Within this transcript of proceedings, If the spelling of any name or term is contained in the exhibits or any other support documentation, it will be reflected as such in the transcript.

If the correct spelling is not made available, then the phonetic spelling will be used in the transcript.

(9:00 a.m.)

MS. DWYER:

Good morning. This is the Pre-Bid meeting for the Senior Database Management Specialist, and I'm sorry about the earlier weather and we had to postpone, but I'm glad you could all be here with us.

I'm June Dwyer. I'm the Procurement Specialist here at MSDE and next to me is Pete Cevenini, who is going to talk to you a little bit about the program after we introduce ourselves.

MR. CEVENINI:

Hi. I'm Pete Cevenini. I'm the CIO here at MSDE.

(Introductions)

MS. DWYER:

Thank you. Pete's going to give us an overview and then we'll entertain questions.

MR. CEVENINI:

The overview is that you've read the TORFP that we've put out. We are currently soliciting bids for the consulting and technical services piece for our Database Manager, Management Specialist. You have the information.

MS. DWYER:

Well, if you could, just tell them a
little bit about the position, what they'll be
doing.

MR. CEVENINI:

Sure. Well right now in the final stages
of a federal contract, Race to the Top, and this
portion would be, I believe, working with Oracle,
right, if I remember correctly. Working with the
Oracle product to finalize work on some security
piece coupled with our Race to the Top dashboards
solution that is already in place.

If you go out on the website you can
probably see some of that information now.

MS. DWYER:

Okay. So in a nutshell, we'll go around
the room and we'll start asking questions, so
Narayan, you want to go first?

Q.   Yes. This is purely you're looking
for Oracle DBA's to manage 40 TMLDS databases.   Are
they also responsible for the OEM/IBM security?
Because we had a TORFP, I think it is still open,
I do not know.

MR. CEVENINI:

They're responsible to interface with those folks.

Q.   Good morning. On page 23 at the very bottom, I'm sorry, C(3. There's a series of Certification prior to that because it's not mentioned, it's only mentioned in this area. And I'm told it's not required. Is that correct, but it's preferred.

MS. DWYER:

It's preferred. Okay.

MR. CEVENINI:

Correct.

Q.   I have other questions. Are we just going to go around and answer them?

MS. DWYER:

Sure.

Q.   Thank you. Is parking provided?

MR. CEVENINI:

It is not.

MS. DWYER:

Does anyone on the phone want to ask a question?

(Inaudible)

MR. CEVENINI:

Right. It is down there but not
required.

COURT REPORTER:

For people on the phone, can we turn down
the phone a little bit.

MS. DWYER:

I'm not sure. We can try. Is that
better?

COURT REPORTER:

Ask them to ask that question again.

MS. DWYER:

Can you ask that question again? Was
that Moheek(?)

Q. (Inaudible) is it required?

MR. CEVENINI:

It's not required. It's preferred.

MS. DWYER:

Anybody else on the phone?

Q. I'm sorry, I was a little bit late
and... I missed the name of, who was giving the
overview?

MS. DWYER:

That was Pete Cevenini. He's our CIO
here at MSDE.

Q.   Oh, okay.   Thank you.   All right.
Thank you.

MS. DWYER:

You're welcome.   All right.   We'll just
go around one more time and see if there are any
more questions.   Narayan, do you have any more
questions?

MALE VOICE:

Not at this time.

MR. CEVENINI:

We can go through all of your questions.

FEMALE VOICE:

Great.   Thank you.

MR. CEVENINI:

Makes it easier.

Q.   So that's on page 23 on B.   There are
no company minimum qualifications.   I just wanted
to verify that that is the case.   Because it's
mentioned somewhere else.   But I just wanted to
clarify that it's not required, but the Company has
any minimum qualifications.

MR. CEVENINI:

Correct.

MS. DWYER:

Just that you're certified to be a Master Contractor...

Q.   And then on page 24 D). It says the Offeror shall be a Small Business Enterprise, certified entity. How do you wish for us to show you that in our proposal?

MS. DWYER:

We will double check but do they give you a number of Small Business Reserve.

Q.   They give ... So I just want to clarify that as well.

MS. DWYER:

Yeah, because DoIT uses a different terminology. But it is Small Business Reserve.

Q.   Okay. And are there any incumbents currently, and if so, how many? And who are they?

MR. CEVENINI:

I don't know the name.

MS. DWYER:

I believe Elicitek is the incumbent currently.

Q.   Can you say that again?

MS. DWYER:

Elicitek, I believe is the incumbent.

Q.   How many labor categories are they providing, is it three? Because I know you were looking for around three.

MS. DWYER:

We're looking for up to three but we're not sure at this point whether – how many exactly it would be.

Q.   Okay. And so they're providing one or two?

MS. DWYER:

I'd have to look. I'm not sure exactly. I'm sorry.

COURT REPORTER:

Can you spell Elicitek?

MR. CEVENINI:

E-L-L-I-C-I-T-E-K.

MS. DWYER:

Just one L.

Q.   Can I piggyback on the same question?

MS. DWYER:

Sure.

Q.   Those people, because I remember that back in CATS II, there was a similar contract awarded and CATS II expired last May. Will this be some Task Order, change order and continuing

covering the time that you award this?

    MS. DWYER:

       CATS II was extended.

    Q.   Okay.

    MS. DWYER:

       For these positions and they will expire May 31st.

    Q.   I have two more questions.

    MS. DWYER:

       Okay. Can we go around and then we'll come back to you? Thanks.

    Q.   Okay.

    Q.   Thank you. That was a good segue. You know, page 25 says prices shall be valid for 120 days and then you just mentioned that this expires May 31st. What's your estimated start date for these people?

    MR. CEVENINI:

       We do not have a plan. I think that the idea is that it would be as soon as possible. So it would be May 30th.

    MS. DWYER:

       Sir, did you have any questions? I'm sorry.

MALE VOICE:

   I'm good.

MS. DWYER:

   Do you want to introduce yourself?

MALE VOICE:

   I'm sorry, I'm Mark Wagner...

MS. DWYER:

   Hi, Mark. And you're?

FEMALE VOICE:

   Laurie Hess, Bithgroup Technologies.

MS. DWYER:

   Did you have any questions?

MS. HESS:

   Not at this time.

MS. DWYER:

   Okay. Anyone on the phone have a question?

   Q. Yes. This Verna from Syscom. You had mentioned that this should start as soon as possible. Is that as soon as possible following May 31st?

MS. DWYER:

   No, it's as soon as possible following recommendation for award and we get approval.

Q. Okay. All right. Thank you.

MS. DWYER:

You're welcome.

Q. I don't have a question but at this time I have a request. Just a statement. I know that there are some challenges, budgets and everything last year. That some TORFP's took over 7 months to award. Okay. And the contract expired last year. Okay?

So we just take that into consideration, that we cannot keep existing people too long on the bench exclusively hoping that something will come through. So I don't know why it took all this time, but I would state if you can process and announce the award within some reasonable time.

That will definitely help us because a lot of challenge coming back and we cannot substitute unless the people want to be ... and so that's our request.

MR. CEVENINI:

I think a very fair request and we are working to eliminate that backlog and trying to award it as quickly as possible because if it takes 7 months for you, that means 7 months of lost time

for us as well.

Q.   Thank you.

MR. CEVENINI:

And project completion. So I agree with you.

Q.   Thank you.

MR. CEVENINI:

And June is somewhat new to working with us and we've very excited that she's here.

Q.   She's very responsive.

MR. CEVENINI:

Yes.

MS. DWYER:

Thank you.

Q.   Yes.

MS. DWYER:

Okay. Did you want to --

Q.   I have two questions on page 26 on B) and C). So in B) it mentions that we have to submit a proposal and a Master Contractor's overall understanding of the TORFP and it mentions Section 3.4. I was trying to figure out which area you're referencing. Is it in this proposal? I did not see 3.4.

MS. DWYER:

Personally, I apologize for that. I think that some references were not corrected before this went out. So I have to look to see what actually that is referencing, and I'll post that in the minutes following.

Q. And then in C), a similar situation. I did want to ask if you're asking for a staffing plan, and again, it references Section 2.9 and 2.10 and we didn't see those in the TORFP. But are you looking for a staffing plan for that?

MS. DWYER:

I don't think we need a staffing plan.

Q. Okay. Because it says additional personnel, but I think they're only requesting one resume per company, right?

MS. DWYER:

Correct.

Q. Okay. So you don't need a staffing plan?

MS. DWYER:

No.

Q. Okay.

MS. DWYER:

We're going around the table and since you just came in, can you tell us who you are?

FEMALE VOICE:

Sure. I'm Tamara (inaudible)... for Infojini. Nice to see you.

MS. DWYER:

Did you have any questions or did you just want a minute to get...

Q.   Just one minute.

MS. DWYER:

Okay. Next, do you have any questions? He's reading diligently on his own. Did you have a question?

MALE VOICE:

Q.   No question.

FEMALE VOICE:

Not at this time.

MS. DWYER:

Anybody on the phone have a question? (Negative response.)

Q.   I have a thing. I note Section page 23, Section, 3 A), Proposed Services. This is a standard thing they ask for everything that is on the proposal resources, proposed solution.

This is a standard boiler- plate requirement but this is just you are asking for a DBA with some good Oracle skills?

Do you want a couple of pages, everybody write the same thing proposing. They are not going to propose any new solutions. So just to reduce the paperwork something which is really, do you still want those standard responses in the proposal? This is a standard boiler-plate ...

MS. DWYER:

It is.

Q. Say I come and tell you, go to DB II, go to the Oracle. Are you going to buy it? No. It is already set. Everything, people are spending millions of dollars on the license and everything. So what I'm saying is the responses here, that is...

MS. DWYER:

Well, we have to follow the boiler-plate as much as possible but we're not requiring you to write up the book.

Q. Right.

MS. DWYER:

You handle it by –

MR. CEVENINI:

You handle it by, you know, a lot of these rules are governed beyond us, but the weight that we put on certain pieces that are standard and not as important, like you're saying. So we will put weight on that.

Q.   This is permanent time you're asking, Pre-Proposal Conferences.

MS. DWYER:

Sure. Maybe some day they'll change the boiler-plate for you. I don't know. But that's not up to us.

MR. CEVENINI:

Your point's well made though. We'll tone that down.

MS. DWYER:

Mary Kay, any questions?

FEMALE VOICE:

No.   Thank you.

MS. DWYER:

Hi. Did you have a question?

Q.   I do. I'm submitting that and I apologize, whatever, ... the Section 2, Project Background.

MR. CEVENINI:

    What page?

Q.   Page 13. These tools are integrated with Oracle as well as third party and custom applications, a general list of what custom applications or third party applications are being used.

MS. DWYER:

    On what page?

Q.   Page 13.

MS. DWYER:

    We could probably provide that after.

Q.   Okay.

MR. CEVENINI:

    Yeah, we can do that. I don't think like right now but...

FEMALE VOICE:

Q.   And for, I'm sorry. Are we still going around?

MS. DWYER:

    That's okay.

Q.   Oh, I apologize. Page 19. For the personnel minimum qualifications. Are there any preferred certifications that you would prefer

from a candidate?

    MS. DWYER:

        We did say earlier we prefer the
CISSP.

    Q.   Okay.   Thank you.

    MR. CEVENINI:

        But not required.

    MS. DWYER:

        Walter?

    MALE VOICE:

        I do not have any further questions.

    MS. DWYER:

        Mark?

    MALE VOICE:

        I'm good.   Thank you.

    MS. DWYER:

        Anybody on the phone have a question?

    (Negative response)

    MS. DWYER:

        Okay.   All right.   I'll open it up now
since we've been around a couple of times.   Does
anybody else in the room have a question?

    Q.   Can you publish how many current
positions you have?

MR. CEVENINI:

 Up to three.

Q. Up to three, but currently how many operating, so it's different what she asked already that.

MS. DWYER:

 Oh, I don't know.

Q. If she asked how many positions they have on the incumbent.

MS. DWYER:

 Yeah. I'm not sure. I have to see if I can get that together because currently projects are winding down and being phased out and things are being completed.

 So there's a lot of change right now and I'm not sure if we have a lot of information readily available.

MR. CEVENINI:

 We certainly don't have it right here.

MS. DWYER:

 Right.

MR. CEVENINI:

 So we can figure that out.

MS. DWYER:

We can probably figure that out.   Anybody else?

Q.   One more question.

MS. DWYER:

Okay.

Q.   Page 13 again, for the purpose.   What monitoring software and security software will you be setting up specifically?

MR. CEVENINI:

Where on the page are you?

Q.   The first paragraph under Purpose. Section 2, Page 13.   It's the third line down.

MR. CEVENINI:

Okay.   We can get that information for you.

Q.   Okay.   Thank you.

MR. CEVENINI:

Yeah, we can get that information for you.

Q.   Okay.   Thank you.   Any way possibly that due date would be extended due to questions not being released yet.

COURT REPORTER:

Keep your voice up.

FEMALE VOICE:

Q. Would the proposal be extended pending the questions being released, the answers to the questions?

MS. DWYER:

I guess it depends on how quickly we get the answers to the questions out. But if we need to, we will entertain extending it.

MR. CEVENINI:

We'll have most of the questions answered today. I'll have the information to you.

Q. Okay. Great.

COURT REPORTER: You'll have my transcript Monday.

MS. DWYER:

Monday?

COURT REPORTER:

Yes.

MS. DWYER:

So probably after Monday we'll release the answers.

MR. CEVENINI:

Pending snow.

MS. DWYER:

Yeah. So if there are delays, we will

extend it.

    MR. CEVENINI:

       Right.

    MS. DWYER:

       Anybody else?

    MALE VOICE: (On telephone)

       You mentioned Oracle, is there any specific tool that you use...

    MR. CEVENINI:

       We're using a variety of tools. I'm not sure what specifically you're asking about. We're using project management tools, we're using security tools.

    Q. Okay.

    MR. CEVENINI:

       I mean I, we have a long list of tools that we use. I'm not sure...

    Q. Okay. You would say Toad and ...

    MR. CEVENINI:

       I'm not familiar with Toad but I'm sure I could... The problem is I would be, I would be uncomfortable starting a list right now and not being inclusive. And then the person would start and realize there are two or three tools that are

missing from the list. But we can put the list, if that's what you all need. We can put a list together. Which I think piggybacks on other questions.

Q.   Okay. And you talk about giving a security code?

MR. CEVENINI:

Right, that's probably part of the list and so I would make sure that we would -- list the various tools and other pieces of software that are being used by this person.

We'll try and make that list, put that list together.

Q.   Okay.

MALE VOICE:

Q.   Concerning that list, if you're going to put out a list and are you anticipating making that a part of the minimum qualifications?

MR. CEVENINI:

Yes.

Q.   Okay.   Thank you.

MR. CEVENINI:

No, Oracle's a primary qualification. The other stuff is, it should be very easy to use and

learn as you go. Oracle's the stuff you can't learn so easily, so.

Q.   Thank you.

MR. CEVENINI:

That's our idea. That's our view of it. So it would not be a determining factor.

Q.   Okay. Thank you.

MR. CEVENINI:

You're welcome.

MS. DWYER:

Are there any more questions?

MALE VOICE: (On telephone)

Q.   This is...

MS. DWYER:

Okay.

Q.   Does the security code, I guess security is a big deal. Would all of us be, I guess, working with the team following the ...or would there be anything custom made based on the environment?

MR. CEVENINI:

There was a beep as you were in the middle of that conversation. You said would there be something about custom made. I'm really unclear

what you asked.

Q.   Yeah. Well, some projects we'll have
to do, you guys will have to produce evidence, where
you're making that security and that sort of, you
know, custom made based on security off their
client.

I'm wondering do you have the security
base directly on what's approved or would there be
some modifications coming from the base that would
be needed to handle the security requirements for
the project?

MR. CEVENINI:

I'm not sure of the answer to your
question. What we'll do is we'll review your
question, if that's okay, and we'll provide a
response on Monday.

Q.   Okay.

MR. CEVENINI:

Simply because I'm a little unsure.
Sorry.

Q.   Okay.

MS. DWYER:

Any other questions?

Q.   Would this ... reporting for

duty here?

    MR. CEVENINI:

       Yes.

    COURT REPORTER:

       Same question again.

    Q.   Whether there's supposed to be.

    MR. CEVENINI:

       Yes, at the main office.

    MS. DWYER:

       There was a question sent in earlier. I don't know if anybody's on line who sent the question in, and it asked about the percentage of work completed remotely. And that would be zero.

       Any other question? Yes?

    Q.   Page 20. In Personnel Preferred Qualifications, General Industry Experience. You're asking for two years of development and supporting educational data warehouses. Are there any specific data warehouses that you're looking for experience?

    MR. CEVENINI:

       What's the letter?

    Q.   Oh, letter A, I apologize. General Industry Experience under A.

MR. CEVENINI:

Sorry. I was reading from the previous section. Repeat your question.

Q. Any specific data warehouse?

MR. CEVENINI:

No.

Q. Okay.

MR. CEVENINI:

Sorry.

Q. Thank you. No problem. Thank you.

MR. CEVENINI:

They all have commonalities.

Q. Okay.

MS. DWYER:

Any more questions? Okay, if there's no more questions, you can still email questions to me. If you think of something afterwards or if we didn't answer something, or you want to clarify, just email me.

And please make sure that if you're on the phone that you email me so that I know you were here. It's june.dwyer@maryland.gov.

Thank you so much and we will speak with you soon, I hope. Have a great weekend.

(Whereupon, at 9:25 a.m. the meeting was adjourned.)

STATE OF MARYLAND

SS:

   I, the undersigned, a Notary Public and qualified Court Reporter of the State of Maryland, do hereby certify that the within transcript was recorded electronically on February 20, 2015 and transcribed under my supervision as herein appears and is an accurate transcript of what is recorded and

audible on the tape.

   I FURTHER CERTIFY that I am not of counsel to any of the parties, nor an employee of counsel, nor any relation to any of the parties, nor in any way interested in the outcome of this action.

   AS WITNESS, my hand and Notarial Seal this 23rd day of February, 2015.

       _____(s)_____

        William Alan Bodenstein

        Notary Public

My commission expires: 11/7/2015

R00B4400138 Senior Database Management Specialist Questions Submitted

Is there currently an incumbent? If so, who is the vendor?
Yes, N-3 Technologies, Elicitek and Curtis Consulting are incumbents.

Since the TORFP is for three (3) Senior Database Management Specialists, can we submit up to 3 resumes?
No. Please see page 13 "Master Contractors must propose exactly one (1) resource in response to this TORFP. "   Please see page 19 "Master Contractor shall propose exactly one (1) resource in response to this TORFP."

Page 23 mentions paper submissions and the other pages discuss an electronic submission. Can you please confirm if this is to be submitted via paper or via electronically?
The preferred method is electronic, however, you may submit paper if you would prefer.

What percentage of work can be completed remotely?
0%.

Page 23 section C states a copy of the current CISSP certification was required. But, this certification is not listed in personnel minimum qualifications on pages 19-20. Can you please confirm if this certification is required?
CISSP is preferred but not required.

ORAL PRESENTATIONS/INTERVIEWS (page 9) states:
"Interviews will be conducted in person for all Offerors meeting minimum qualifications. All candidates shall be interviewed in substantially the same manner. The Procurement Officer shall, for each round of interviews, determine whether phone or in-person interviews will be utilized." Will the interviews be with: (1) The candidates proposed, (2) The Offeror leadership, or (3) Both?
The Candidates proposed.

I would really appreciate if you could provide the details as to what type of 'written communication samples' shall be provided at the time of the Interview, As mentioned in the 'MINIMUM QUALIFICATIONS' - "CONTRACTOR AND PERSONNEL PREFERRED QUALIFICATIONS". (pg 20)
Examples of documents, letters, or reports written by candidate that best demonstrate his or her experience with database management.

Could you please clarify what the "*Offeror's Company Minimum Qualifications"* are for this TORFP? I do not see any listed on page 19, but the paragraph states that the proposal and references will be used to verify minimum qualifications.
The Contractor must be an approved Master Contractor on CATS + and a certified Small Business Reserve Contractor. MSDE will verify this.

The TORFP mentions working with security software. Will all of the software security requirements be satisfied through working with the security software, or will it also be necessary to to show that the applications are secure by means outside of the security software – for example, application screenshots or proof of adherence to policies?
Oracle OAM and OIM are the security software that we reference.
All security software will be purchased and supported by MSDE staff. Proof of adherence to policies will be evaluated by MSDE staff.

Attachment 10 is listed on Page 13 under Purpose, it is referenced that it needs to be signed by the TO Contractor Personnel. Attachment 10 is not listed in the Summary of Attachments on page 23. Can the state please clarify if a signed Attachment 10 needs to be submitted with the Proposal?
    See page 28 List of Attachments: Attachment 10 Non-Disclosure Agreement (Offeror) Applicable Do Not Submit with Proposal. Those will be submitted at a later date.

How many years of security experience do you wish the candidate to have?
    3+ years of experience minimum is preferred

"Part F "Master Contractor and Subcontractor Experience and Capabilities" under the Technical Proposal submission requirements, based on its' title, suggests that MSDE is requesting three (3) references of the Master Contractor and/or the Subcontractor. But, item 1) under it requests to provide three (3) reference of the projects that the Master Contractor's proposed candidate has completed. Please clarify whose references should be included in the proposal; the Master Contractor/Subcontractor or the Proposed Resource?
    The proposed resource's references should be submitted.

Will you accept candidates who are not citizens of the US?
    That could be considered.   A current VISA which will not expire during the contract term must be provided. It is the Master Contractor's responsibility to monitor the candidate's status and inform MSDE of any issues immediately. Adherence to DoIT's substitution of personnel is required.   All background checks must be completed.

Questions from the Pre-Proposal Conference:

This is purely you're looking for Oracle DBA's to manage 40 TMLDS databases. Are they also responsible for the OEM/IBM security?
    Yes to OEM, NO to IBM security

On page 23 at the very bottom, I'm sorry, C(3. There's a series of Certification prior to that because it's not mentioned, it's only mentioned in this area. And I'm told it's not required. Is that correct, but it's preferred.
    It is preferred, not required.

Is parking provided?
    No.

Page 23 on B. There are no company minimum qualifications. I just wanted to verify that that is the case. Because it's mentioned somewhere else. But I just wanted to clarify that it's not required, but the Company has any minimum qualifications.
    Just that you're certified to be a Master Contractor on the CATS + contract with DoIT.

Page 24 D). It says the Offeror shall be a Small Business Enterprise, certified entity. How do you wish for us to show you that in our proposal?
    We will double check that you are a certified Small Business Reserve firm. If you have a number from registering, you should provide that.

And are there any incumbents currently, and if so, how many? And who are they?
    Yes, N-3 Technologies, Elicitek and Curtis Consulting are incumbents.

How many labor categories are they providing, is it three? Because I know you were looking for around three.

We are looking for up to three (3), however that may change depending on the available appropriations, the end of projects and the quality of the proposed candidates. The incumbents were awarded under a multiple resource contract so the current functional categories are not readily accessible.

There was a similar contract awarded and CATS II expired last May. Will this be some Task Order, change order and continuing covering the time that you award this?

CATS II was extended until May 31st for specific projects. This will be a new task order from CATS +.

Page 25 says prices shall be valid for 120 days and then you just mentioned that this expires May 31st. What's your estimated start date for these people?

It would be as soon as possible but by May 30th.

You had mentioned that this should start as soon as possible. Is that as soon as possible following May 31st?

No, it's as soon as possible following recommendation for award and we get approval.

On page 26 on B) and C). So in B) it mentions that we have to submit a proposal and a Master Contractor's overall understanding of the TORFP and it mentions Section 3.4. I was trying to figure out which area you're referencing. Is it in this proposal? I did not see 3.4.

It appears that the numbering in section 3 was not corrected. Corrected pages will be posted.

And then in C), a similar situation. I did want to ask if you're asking for a staffing plan, and again, it references Section 2.9 and 2.10 and we didn't see those in the TORFP. But are you looking for a staffing plan for that? It says additional personnel, but I think they're only requesting one resume per company, right?

It appears that the numbering in section 2 was not corrected. Corrected pages will be posted. The answer is that we don't need a staffing plan, just a Resume.

Section page 23, Section, 3 A), Proposed Services. This is a standard thing they ask for everything that is on the proposal resources, proposed solution. This is a standard boiler- plate requirement but this is just you are asking for a DBA with some good Oracle skills?

Do you want a couple of pages, everybody write the same thing proposing. They are not going to propose any new solutions. So just to reduce the paperwork something which is really, do you still want those standard responses in the proposal? This is a standard boiler-plate.

We must adhere to the requirements of the state. We are unable to change standard wording. Please provide a sentence or two showing your understanding of the TORFP. No need to write a book, a few sentences will suffice.

Page 13. These tools are integrated with Oracle as well as third party and custom applications, a general list of what custom applications or third party applications are being used.

Tools:
> **Red Hat**
> **VMWare**
> **Informatica**
> **Avamar**

Oracle Tools we use or want to use:
> **Oracle Enterprise Manager**
> **Business Intelligence Suite Enterprise Edition Plus**
> **Database Enterprise Edition**
> **Advanced Security**

Business Intelligence Management Pack
Data Masking Pack for DB
WebCenter Portal
Diagnostics Pack for DB
Tuning Pack for DB
Change Management Pack for DB
WebLogic Suite
Identity and Access Management Suite Plus

Page 19. For the personnel minimum qualifications. Are there any preferred certifications that you would prefer from a candidate?
We did say earlier we prefer the CISSP.

Can you publish how many current positions you have?
No, we won't be able to do that. There are changes happening with the end of Race-to-the-Top, projects winding down and being completed.   It is not relevant to this TORFP.

What monitoring software and security software will you be setting up specifically?
Same as list above

Any way possibly that due date would be extended due to questions not being released yet?
It depends on how quickly we get the answers to the questions out. But if we need to, we will entertain extending it.

You mentioned Oracle, is there any specific tool that you use...
Same as list above

If you're going to put out a list and are you anticipating making that a part of the minimum qualifications?
No, Oracle's a primary qualification.

Does the security code, I guess security is a big deal. Would all of us be, I guess, working with the team following the ...or would there be anything custom made based on the environment?
Well, some projects we'll have to do, you guys will have to produce evidence, where you're making that security and that sort of, you know, custom made based on security off their client.
I'm wondering do you have the security base directly on what's approved or would there be some modifications coming from the base that would be needed to handle the security requirements for the project?
The resource is expected to use the tools and applications provided by MSDE.

Would this ... reporting for duty here?
Yes.

Page 20. In Personnel Preferred Qualifications, General Industry Experience. You're asking for two years of development and supporting educational data warehouses. Are there any specific data warehouses that you're looking for experience?
No.

SECTION 2 - SCOPE OF WORK

2.1 PURPOSE

MSDE is issuing this CATS+ TORFP to obtain up to three (3) onsite Senior Database Management Specialists to assist in preparing setup and system operations requirements for databases and associated server software, and implementing databases, monitoring software, security software, and IT security systems, Batch programs, and data transfers to support various MSDE projects. This role shall also manage a variety of Oracle databases and data repositories. Given the sensitivity of data associated with the work, the TO Contractor Personnel assigned to this project shall comply with the requirements of CATS+ RFP Section 2.4.3.2 and sign Non-Disclosure Agreements as described in Section 1.7 above.

Master Contractors must propose exactly one (1) resource in response to this TORFP.

MSDE will award a Task Order to one or more Master Contractors that propose a resource that can satisfy the TO requirements. Selection for award shall be based on best value to the State.

2.2 REQUESTING AGENCY BACKGROUND

MSDE is a State agency that was established in 1916, and is overseen by The State Board of Education, to provide for the "general care and supervision of public education" in Maryland. MDSE is currently made up of 16 Divisions that oversee, develop, and support the delivery of PreK12 education through 24 county schools systems.

MSDE exemplifies energetic leadership and innovative products and services to improve public education, library services, and rehabilitation services. The Agency receives funds from the United States Department of Education and other entities to implement educational reforms in Maryland and improve the collection and dissemination of information on school and student performance.

2.3 PROJECT BACKGROUND

 The Maryland State Department of Education (MSDE) is making reports and applications available to educators, students, and administrators as part of the federal Race To The Top program. In many cases the data presented is specific to the educator, student or administrator and so security is required so that users will only have access to data that is appropriate for the their level of access. Most users have access to their local school system's portal so MSDE is taking advantage of that and federating with those local systems using Oracle's security tools including Oracle Access Manager and Oracle Identity Manager to provide Single Sign On. These tools are integrated with Oracle Business Intelligence Enterprise Edition as well as third party and custom applications to seamlessly provide the users with the required access. The purpose of this project is to support the local school systems in this integration with the tools being made available via Race To The Top.

2.4 PROFESSIONAL DEVELOPMENT
 Any IT services personnel provided under this TORFP shall maintain any required professional certifications for the duration of the resulting TO.

2.5 REQUIRED POLICIES, GUIDELINES AND METHODOLOGIES

The TO Contractor shall comply with all applicable laws, regulations, policies, standards and guidelines affecting information technology and technology projects, which may be created or changed periodically.

The TO Contractor shall adhere to and remain abreast of current, new, and revised laws, regulations, policies, standards and guidelines affecting security and technology project execution.

The foregoing may include, but are not limited to, the following policies, guidelines and methodologies that can be found at the DoIT site (http://doit.maryland.gov/policies/Pages/ContractPolicies.aspx).

- The State of Maryland System Development Life Cycle (SDLC) methodology
- The State of Maryland Information Technology Security Policy and Standards
- The State of Maryland Information Technology Non-Visual Access Standards
- The TO Contractor shall follow project management methodologies consistent with the Project Management Institute's Project Management Body of Knowledge Guide.
- TO Contractor assigned personnel shall follow a consistent methodology for all TO activities.
- The State's Information Technology Project Oversight Policies for any work performed under this TORFP for one or more Major IT Development Projects (MITDPs)

2.6 REQUIREMENTS

The Senior Database Management Specialist shall:

ID #	Senior Database Management Specialist Responsibilities	Associated Deliverable ID # (From Section 2.5.2 below):
2.6.1	Provide, on a continual basis for all assigned tasks, the personnel required in this TORFP within the timeframe required as specified by the TO Manager.	2.8.2.1
2.6.2	Provide support during core business hours. The core business hours are defined in section 2.11.1.	2.8.2.1
2.6.3	Define file organization, indexing methods, and security procedures for database and applications.	2.8.2.2
2.6.4	Develop, implement, and maintain database back-up and recovery procedures for the processing environments, and ensures their data integrity, security, and recoverability.	2.8.2.2
2.6.5	Install, manage, monitor, tune, and patch Oracle 11g databases and associated Oracle 11g products and applications.	2.8.2.2

2.6.6	Implement, manage, and update Oracle Grid Control 12c, and monitor all server and application environments.	2.8.2.2
2.6.7	Assist in the design, installation, and configuration of new and existing servers and their operating environments.	2.8.2.2
2.6.8	Assist in the definition of best data center practices for the Oracle environment.	2.8.2.2
2.6.9	Produce weekly status report.	2.8.2.3

2.7 PERFORMANCE AND PERSONNEL

2.7.1   WORK HOURS

- Business Hours Support: The TO Contractor's collective assigned personnel shall support core business hours (Monday-Friday 8 AM – 5 PM), except for State holidays, Service Reduction days, and Furlough days observed by MSDE. TO Contractor Personnel may also be required to provide occasional support outside of core business hours, including evenings, overnight, and weekends, to support: specific efforts and emergencies to resolve system repair or restoration.

- State Mandated Service Reduction Days: TO Contractor Personnel shall be required to participate in the State mandated Service Reduction Days as well as State Furlough Days. In this event, the TO Contractor will be notified in writing by the TO Manager of these details.

- Minimum and Maximum Hours: Full-time TO Contractor Personnel shall work a minimum of 40 hours per week with starting and ending times as approved by the TO Manager. A flexible work schedule may be used with TO Manager approval, including time to support any efforts outside core business hours. TO Contractor Personnel may also be requested to restrict the number of hours TO Contractor Personnel can work within a given period of time that may result in less than an eight hour day or less than a 40 hour work week.

- Vacation Hours: Requests for leave shall be submitted to the TO Manager at least two weeks in advance. The TO Manager reserves the right to request a temporary replacement if leave extends longer than one consecutive week. In cases where there is insufficient coverage, a leave request may be denied.

2.7.2   PERFORMANCE EVALUATION

TO Contractor personnel will be evaluated by the TO Manager on an as needed basis.

2.7.3   PERFORMANCE ISSUE MITIGATION

At any time during the TO period of performance, should the performance of a TO Contractor resource be unsatisfactory as determined by the TO Manager, MSDE will pursue the following mitigation procedures prior to requesting a replacement employee:

The TO Manager shall document performance issues and give written notice to the TO Contractor, clearly describing problems and delineating remediation requirement(s).

The TO Contractor shall respond with a written remediation plan within three (3) business days and implement the plan immediately upon written acceptance by the TO Manager.

Should performance issues persist, the TO Manager may give written notice or request the immediate removal of person(s) whose performance is at issue, and determine whether a substitution is required.

2.7.4   SUBSTITUTION OF PERSONNEL AFTER AWARD

The substitution of key personnel during the evaluation period, prior to award, is prohibited. Substitutions of any kind, post proposal due date, but prior to award, is considered to be the equivalent of an alternate proposal, and is prohibited.

The procedure for substituting personnel after award is as follows:

A) The TO Contractor may not substitute personnel without the prior approval of the TO Manager.

B) To replace any personnel, the TO 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.

C) Proposed substitute individual shall be approved by the TO Manager. The 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 TO Manager shall notify the TO Contractor of acceptance or denial of the requested substitution. If no acceptable substitute personnel is proposed within the time frame established by the TO Manager, the TO Agreement may be cancelled.

2.7.5 PREMISES AND OPERATIONAL SECURITY

A) Prior to commencement of work, TO Contractor Personnel to be assigned to perform work under the resulting Task Order shall be required to submit background check certification to MSDE from recognized Law Enforcement Agencies, including the FBI. TO Contractor shall be responsible for ensuring that TO Contractor Personnel background check certifications are renewed annually, and at the sole expense to the TO Contractor MSDE reserves the right to disqualify any TO Contractor employees or subcontractors whose background checks suggest conduct, involvements, and/or associations that MSDE determines, in its sole discretion, may be inconsistent with the performance and/or security requirements set forth in this TORFP. MSDE reserves the right to perform additional background checks on TO Contractor Personnel.

B) Further, TO Contractor Personnel may be subject to random security checks during entry and exit of State secured areas. The State reserves the right to require TO Contractor Personnel to be accompanied while on secured premises.

C) TO Contractor employees shall, while on State premises, display their State issued identification cards without exception.

D) TO Contractor shall require its employees to follow the State of Maryland and MSDE IT Security Policy and Standards throughout the term of the TO Agreement.

E) The State reserves the right to request that the TO Contractor submit proof of employment authorization of non-United States citizens, prior to commencement of TO Contractor Personnel work under the Task Order.

F) TO Contractor shall remove any TO Contractor Personnel from working on the resulting TO Agreement where the State of Maryland provides evidence to the TO Contractor that said TO Contractor Personnel has not adhered to the security requirements specified herein.

G) The cost of complying with all security requirements specified herein are the sole responsibilities and obligations of the TO Contractor and its subcontractors and no such costs shall be passed through to or reimbursed by the State or any of its agencies or units.

TO Contractor shall complete a criminal background check prior to any individual TO Contractor Personnel being assigned work on the project. TO Contractor shall provide a Criminal Background Check Affidavit (Attachment 19) prior to any work commencing on the Task Order.

2.8 DELIVERABLES
2.8.1 DELIVERABLE SUBMISSION

Unless specified otherwise, written deliverables shall be compatible with Microsoft Office, Microsoft Project and/or Microsoft Visio versions 2007 or later. At the TO Manager's discretion, the TO Manager may request one hard copy of a written deliverable.

Draft versions of a deliverable shall comply with the minimum deliverable quality criteria listed in Section 2.8.3.

2.8.2 DELIVERABLE ACCEPTANCE

A final deliverable shall satisfy the scope and requirements of this TORFP for that deliverable, including the quality and acceptance criteria for a final deliverable as defined in Section 2.8.4 Deliverable Descriptions/Acceptance Criteria.

The TO Manager shall review a final deliverable to determine compliance with the acceptance criteria as defined for that deliverable. The TO Manager is responsible for coordinating comments and input from various team members and stakeholders. The TO Manager is responsible for providing clear guidance and direction to the TO Contractor in the event of divergent feedback from various team members.

TO Manager will issue to the TO Contractor a notice of acceptance or rejection of the deliverable in the DPAF (Attachment 9). Following the return of the DPAF indicating "Accepted" and signed by the TO Manager, the TO Contractor shall submit a proper invoice in accordance with the

procedures in Section 2.13.

In the event of rejection of a deliverable, the TO Manager will formally communicate in writing any deliverable deficiencies or non-conformities to the TO Contractor, describing in those deficiencies what shall be corrected prior to acceptance of the deliverable in sufficient detail for the TO Contractor to address the deficiencies. The TO Contractor shall correct deficiencies and resubmit the corrected deliverable for acceptance within the agreed-upon time period for correction.

2.8.3 MINIMUM DELIVERABLE QUALITY

The TO Contractor shall subject each deliverable to its internal quality-control process prior to submitting the deliverable to the State.

Each deliverable shall meet the following minimum acceptance criteria:

A) Be presented in a format appropriate for the subject matter and depth of discussion.

B) Be organized in a manner that presents a logical flow of the deliverable's content.

C) Represent factual information reasonably expected to have been known at the time of submittal.

D) In each section of the deliverable, include only information relevant to that section of the deliverable.

E) Contain content and presentation consistent with industry best practices in terms of deliverable completeness, clarity, and quality.

F) Meets the acceptance criteria applicable to that deliverable, including any State policies, functional or non-functional requirements, or industry standards.

G) Contains no structural errors such as poor grammar, misspellings or incorrect punctuation.

A draft written deliverable may contain limited structural errors such as incorrect punctuation, and shall represent a significant level of completeness toward the associated final written deliverable. The draft written deliverable shall otherwise comply with minimum deliverable quality criteria above.

2.8.4 DELIVERABLE DESCRIPTIONS / ACCEPTANCE CRITERIA

The TO Contractor may suggest other subtasks, artifacts, or deliverables to improve the quality and success of the assigned tasks.

ID #	Deliverable Description	Acceptance Criteria	Due Date / Frequency
2.8.4.1	Timesheets	Perform assigned tasks, and complete those assigned tasks within the timeframe required, as specified by the TO Manager. Submit timesheet.	Delivered on time as required (timeframe varies).

2.8.4.2	Weekly Status Reports	At the conclusion of each work week, the TO Contractor shall be responsible for compiling and submitting to the TO Manager, a weekly status report that summarizes the following: • Assigned work efforts and status (completed, in progress, on-hold) and issues identified. • Emergency work efforts and issues identified. • Proposed activities for the upcoming workweek. • Hours worked by individual TO Contractor personnel. • Any application, data anomaly, or bug worked on and fixed.	Delivered complete and on time - Submitted Monday, 12:00 PM (Noon) via email in Word format. *If Monday is a holiday or a service reduction day, the TO Contractor shall submit the report no later than 12:00 PM (Noon) the following business day.*

2.9 MINIMUM QUALIFICATIONS

2.9.1 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.

2.9.2 OFFEROR'S PERSONNEL MINIMUM QUALIFICATIONS

Master Contractors shall propose exactly one (1) resource in response to this TORFP.

For the personnel proposed under this TORFP, proposed resources shall meet all minimum qualifications for the labor category proposed, as identified in the CATS+ Master Contract Section 2.10 plus the following minimum qualifications. Resumes shall clearly outline starting dates and ending dates for each applicable experience or skill.

The following minimum qualifications are mandatory. Each of the Master Contractor's staff shall demonstrate expertise in the following:

A. Education - BS in Computer Science required or related field.
B. Four (4) years of experience installing, upgrading, and migrating Oracle 10g and 11g Business Intelligence and Oracle Security Suite.
C. Four (4) years of experience reading ERD and dimensional models and translating into table structures, keys, and indexes.
D. Four (4) years of experience reading and writing SQL and PL/SQL code.
E. Four (4) years of experience using Enterprise Manager to monitor system performance.
F. Four (4) years of experience writing batch programs and using the alerts and scheduler to create automatic monitoring and management processes
G. Four (4) years of experience opening, closing, copy, importing and exporting SQL and Oracle databases.

H. Four (4) years of experience identifying and tuning both OS and Oracle SAG.
I. Four (4) years of experience with backup and recovery of databases.
J. Four (4) years of experience setting up and performing snapshots and replication.
K. Four (4) years of experience setting up and managing Oracle Real Application Clusters.
L. Four (4) years of experience managing and monitoring application output logs. .
M. Four (4) years of experience with Oracle support filing technical assistance requests or service requests. .

2.10 TO CONTRACTOR AND PERSONNEL PREFERRED QUALIFICATIONS

A. **General Industry Experience**: Two (2) years of experience developing and supporting educational data warehouses.
B. **Good oral and written communication skills**. This will be validated during the interview process. Candidates shall submit samples of past written communications for review during the interview. Sensitive information can be redacted. Oral communication skills can and will be validated during the interview process.

2.11 RETAINAGE

THIS SECTION IS NOT APPLICABLE TO THIS TORFP.

2.12 WORK ORDER PROCESS

THIS SECTION IS NOT APPLICABLE TO THIS TORFP.

2.13 INVOICING

Invoice payments to the TO Contractor shall be governed by the terms and conditions defined in the CATS+ Master Contract.

Proper invoices for payment shall be submitted to the TO Manager for payment approval as described below. Invoices shall be submitted monthly.

2.13.1 INVOICE SUBMISSION PROCEDURE

A) Proper invoices for payment shall contain the TO Contractor's Federal Tax Identification Number, "MSDE" as the recipient, date of invoice, TO Agreement number, deliverable description, deliverable number (e.g.,"2.7.4.1."), period of performance covered by the invoice, a total invoice amount, and a TO Contractor point of contact with telephone number.

B) All invoices submitted for payment shall be accompanied by signed notice(s) of acceptance as described in Section 2.13.1.1. Payment of invoices will be withheld if the appropriate signed acceptance form is not submitted is not submitted.

C) The TO Contractor shall send the original of each invoice signed DPAF for each deliverable being invoiced submitted for payment to the MSDE at the following address:

Maryland State Department of Education

>Attention: Accounts Payable
>200 West Baltimore Street
>Baltimore, MD   21201

D) 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 60 calendar days from the TO Agreement termination date.

2.13.2 T&M INVOICE SUBMISSION PROCEDURE

The following applies for any T&M invoices, whether for the Task Order requirements or for Work Orders issued under this Task Order.

The TO Contractor shall include a signed timesheet for each deliverable being invoiced with the signed invoice.

2.14 TIME SHEET SUBMISSION AND ACCEPTANCE

Within three (3) business days after the 15th and last day of the month, the TO Contractor shall submit a semi-monthly timesheet for the preceding half month providing data for all resources provided under the TO.

At a minimum, each semi-monthly timesheet shall show:

A) Title: "Time Sheet for Senior Database Management Specialist" B)
Issuing company name, address, and telephone number
C) For each employee /resource:
   a) Employee / resource name
   b) For each period ending date, e.g., "Period Ending: mm/dd/yyyy" (Periods run 1st through 15th and 16th through last day of the month).
      (1) Tasks completed that week and the associated deliverable names and ID#s
      (2) Number of hours worked each day
      (3) Total number of hours worked that period
      (4) Weekly variance above or below 40 hours
      (5) Annual number of hours planned under the TO
      (6) Annual number of hours worked to date
      (7) Balance of hours remaining
      (8) Annual variance to date (Sum of periodic variances)
D) Signature and date lines for the TO Manager

E) Submission of time sheets shall be to the TO Manager for approval by signature.

2.15 SOC TYPE II AUDIT

A SOC 2 Type II Report is not a requirement for this TO.

SECTION 3 - TASK ORDER PROPOSAL FORMAT AND SUBMISSION REQUIREMENTS

3.1 REQUIRED RESPONSE

Each Master Contractor receiving this CATS+ TORFP shall respond no later than the submission due date and time designated in the Key Information Summary Sheet. Each Master Contractor is required to submit one of two possible responses: 1) a proposal; or 2) a completed Master Contractor Feedback Form. The feedback form helps the State understand for future contract development why Master Contractors did not submit proposals. The form is accessible via the CATS+ Master Contractor login screen and clicking on TORFP Feedback Response Form from the menu.

A TO Proposal shall conform to the requirements of this CATS+ TORFP.

3.2 SUBMISSION

3.2.1 E-MAIL SUBMISSION

The TO Proposal shall be submitted via two e-mails.

MSDE can only accept e-mails that are less than or equal to 10 MB. If a submission exceeds this size, split the submission into two or more parts and include the appropriate part number in the subject (e.g., part 1 of 2) after the subject line information above.

The TO Technical Proposal shall be contained in one e-mail, with two attachments. This e-mail shall include:

- Subject line "CATS+ TORFP # R00B4400138 Technical" plus the Master Contractor Name
- One attachment labeled "TORFP R00B4400138 Technical - Attachments" containing all Technical Proposal Attachments (see Section 3.3 below), signed and in PDF format.
- One attachment labeled "TORFP R00B4400138 Technical – Proposal" in Microsoft Word format (version 2007 or greater).

The TO Financial Proposal shall be contained in one e-mail containing as attachments all submission documents detailed in section 3.4.2, with password protection. MSDE will contact Offerors for the password to open each file. Each file shall be encrypted with the same password.

- Subject line "CATS+ TORFP # R00B4400138Financial" plus the Master Contractor Name
- One attachment labeled "TORFP R00B4400138Financial" containing the TO Financial Proposal contents, signed and in PDF format.

3.3. SUMMARY OF ATTACHMENTS

No attachment forms shall be altered. Signatures shall be clearly visible.
The following signed attachments shall be included with the TO Technical Proposal in PDF format (for e-mail delivery). For paper submissions, submit two (2) copies of each with original signatures.

- Attachment 4 – Conflict of Interest Affidavit and Disclosure
- Attachment 5 - 5A and 5B- Attachment 5A Minimum Qualifications Summary and Attachment 5B Personnel Resume Form
- Attachment 13 – Living Wage Affidavit of Agreement
- Attachment 16 - Certification Regarding Investments in Iran

   The following attachments shall be included with the TO Financial Proposal:
- Attachment 1 Price Sheet – Signed PDF

3.4 TO PROPOSAL FORMAT

A TO Proposal shall contain the following sections in order:

3.4.1 TO TECHNICAL PROPOSAL

Important: A TO Technical Proposal shall include NO pricing information.

A) Proposed Services

1) Executive Summary: A one-page summary describing the Offeror's understanding of the TORFP scope of work (Section 2) and proposed solution.

2) Proposed Solution: A more detailed description of the Offeror's understanding of the TORFP scope of work, proposed methodology and solution. The proposed solution shall be organized to exactly match the requirements outlined in Section 2.

3) Assumptions: A description of any assumptions formed by the Offeror in developing the TO Technical Proposal.

4) Tools the Master Contractor owns and proposes for use to meet any requirements in Section 2.

B) Compliance with Offeror's Company Minimum Qualifications This TORFP has no Offeror Company Minimum Qualifications.

C) Proposed Personnel and TORFP Staffing

Offeror shall propose exactly one (1) resource in response to this TORFP.

1) Complete and provide for each proposed resource Attachment 5A Minimum Qualifications Summary and Attachment 5B Personnel Resume Form.

3) Provide evidence proposed personnel possess the required certifications in accordance with Section 2.9.2 Offeror's Personnel Minimum Qualifications. Also provide a copy of the proposed personnel's current CISSP certificate.

4) Provide three (3) references per proposed personnel containing the information listed in Attachment 5B.

5) Provide the names and titles of the Offeror's management staff who will supervise the personnel and quality of services rendered under this TO Agreement.

D) MBE, SBE Participation and VSBE

The Offeror shall be a Small Business Enterprise (SBE) certified entity as stated in the notice to bidders on page 2.

E) Subcontractors

Identify all proposed subcontractors, including MBEs, and their roles in the performance of Section 2 - Scope of Work.

F) Master Contractor and Subcontractor Experience and Capabilities

1) Provide up to three (3) references for projects or contracts the Master Contractor's proposed candidate has completed that were similar to Section 2 - Scope of Work. Each example shall include contact information for the client organization complete with the following:

   a) Name of organization.

   b) Point of contact name, title, e-mail, and telephone number (point of contact shall be accessible and knowledgeable regarding work performed).

   c) Services provided as they relate to Section 2 - Scope of Work.

   d) Start and end dates for each example engagement or contract.

   e) Current Master Contractor team personnel who participated on the engagement.

   f) If the Master Contractor is no longer providing the services, explain why not.

G) State of Maryland Experience: If applicable, the Master Contractor shall submit a list of all contracts it currently holds or has held within the past five (5) years with any entity of the State of Maryland. For each identified contract, the Master Contractor shall provide the following (if not already provided in sub paragraph 1 above:

   a) Contract or task order name

   b) Name of organization.

   c) Point of contact name, title, e-mail, and telephone number (point of contact shall be accessible and knowledgeable regarding experience).

   d) Services provided as they relate to Section 2 - Scope of Work.

   e) Start and end dates for each engagement or contract. If the Master Contractor is no longer providing the services, explain why not.

   f) Dollar value of the contract.

   g) Indicate if the contract was terminated before the original expiration date.

   h) Indicate if any renewal options were not exercised.

Note - State of Maryland experience can be included as part of Section 2 above as engagement or contract experience. State of Maryland experience is neither required nor given more weight in proposal evaluations.

H) State Assistance

Provide an estimate of expectation concerning participation by State personnel.

I) Confidentiality

A Master Contractor should give specific attention to the identification of those portions of its proposal that it considers confidential, proprietary commercial information or trade secrets, and provide justification why such materials, upon request, should not be disclosed by the State under the Public Information Act, Title 4, of the General Provisions Article of the Annotated Code of Maryland. Master Contractors are advised that, upon request for this information from a third party, the TO Procurement Officer will be required to make an independent determination regarding whether the information may be disclosed.

3.4.2 TO FINANCIAL PROPOSAL

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) Attachment 1 - Price Sheet with all proposed labor categories including all rates fully loaded. Master Contractors shall list all key resources by approved CATS+ labor categories in the price proposal.

C) To be responsive to this TORFP, the Price Sheet (Attachment 1) shall provide labor rates for all labor categories anticipated for this TORFP.   Proposed rates shall not 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.

D) Prices shall be valid for 120 days.

THE REMAINDER OF THIS PAGE INTENTIONALLY LEFT BLANK.