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| --- |
| **Section 1 – General Information** |
| **RFR Number:****(Reference BPO Number)** |

|  |
| --- |
| **060B3490015** |

 |
| **Functional Area****(Enter One Only)** | **Functional Area 10 – IT Management Consulting Services**  |
| **Labor Category/s***An RFR is limited to only labor categories defined in the CATS+ RFP.* |
| *Enter the labor category/s to be provided:* |
| 1. Project Manager (CATS+ Labor Category #2)
2. Architect, Systems Design (CATS+ Labor Category #64)
 |
| **Anticipated Start Date** | 06/19/2017 |
| **Duration of Assignment** | 6 Months |
| **Designated Small Business Reserve?(SBR):(Enter “Yes” or “No”)** | No |
| **MBE Goal, if applicable** | 0% |
| **Issue Date:mm/dd/yyyy** | 05/24/2017 | **Due Date:** mm/dd/yyyy | 5/31/2017 |
|  | **Time (EST):** 00:00 am/pm | No later than 4:00 PM EST.  |
| **Place of Performance:** | Department of Information Technology100 Community PlaceCrownsville, MD 21032 |
| **Special Instructions:****(e.g. interview information, attachments, etc.)** | DoIT intends to award this RFR for one (1) Technical Project Manager and one (1) IT Architect resource to one (1) Master Contract that propose candidates that can best satisfy the RFR requirements. Interviews, which are a type of oral presentation, will be performed, by phone **or** in person, for all Offerors meeting minimum qualifications, or, in the event of a downselect, for all Offerors identified in the downselect process (see below). At the Procurement Officer’s discretion, an interview via the web, e.g., Skype, GotoMeeting, WebEx, may be held in lieu of an in-person meeting. Substantively, 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.In the event that more than ten (10) qualified proposals are received, the TO Procurement Officer may elect to follow a down-select process as follows:1. A technical ranking will be performed for all proposals based on the resume. Proposals will be ranked from highest to lowest for technical merit based on the quality of the resumes submitted and the extent to which the proposed individual’s qualifications align with the position needs as described in this RFR.
2. The top ten (10) proposals identified by the technical ranking will be invited to interview. All other Offerors will be notified of non-selection for this TORFP.
 |
| **Security Requirements** **(if applicable):** | Proposed resources must be able to pass the State’s background check and obtain a badge to the office space.  |
| **Invoicing Instructions**1. After the end of each month, the Master Contractor shall submit timesheets (for hourly invoicing) and activity reports (for both hourly and annual invoicing) to the Agency Task Order Manager (TO Manager) for review prior to submitting an invoice.
2. The TO Manager shall review, sign, and return to the Master Contractor the timesheets (for hourly invoicing) or the activity reports (for annual invoicing).
3. The Master Contractor shall send a copy of the signed timesheets or activity reports with an invoice to the Agency TO Manager.
4. The Master Contractor shall invoice as follows:
5. Hourly Labor Rate:Task Orders awarded at the Hourly Labor Rate shall be invoiced monthly for actual hours x Labor Rate.
 |
| **Section 2 – Agency Procurement Officer (PO) Information** |
| **Agency / Division Name:** | Department of Information Technology  |
| **Agency PO Name:** | Larif Hamm  | **Agency PO Phone Number:** | 410-697-9674 |
| **Agency PO Email Address:** | Larif.Hamm@Maryland.gov  | **Agency PO Fax:** | N/A |
| **Agency PO Mailing Address:** | 100 Community Place Crownsville, MD 21032 |
| **Section 3 – Scope of Work** |
| **Agency / Project Background** |
| DoIT is seeking a technical project manager and an IT Architect (Systems Design) to implement a pilot program that issues and manages licenses and permits utilizing SeamelessDocs technology platform. |
| **Job Description/s** |
| **Labor Category/s** **(From Section 1 Above)** | **Duties / Responsibilities** |
| 1. Project Manager (CATS+ Labor Category #2)
 | 1. This position reports directly to the [Senior Project Manager] and is responsible for all technical aspects of the pilot project.
2. The Technical Project Manager (TPM) is responsible for managing the technical elements of the project in accordance with Project Management Body of Knowledge (PMBOK) and the State’s Systems Development Lifecycle (SDLC).
3. The TPMshall ensure the appropriate application of the Project Management Institute’s (PMI) Project Management Body of Knowledge (PMBOK) and the State’s Systems Development Lifecycle (SDLC) in managing the project.
4. The TPM is responsible for interfacing with external agencies to gather workflows, processes, and business requirements.

***See Attachment 3 for a detailed description of duties, responsibilities and deliverables.*** |
| 1. Architect, Systems Design ( CATS+ Labor Category #64)
 | 1. This position reports directly to the [Senior Project Manager] and is responsible for all technical aspects of the [Project Name] project.
2. The IT Architect is responsible for providing data integration strategies between internal systems/databases and SeamlessDocs platform, delivering best practice for API design and implementation, and developing a scalable integration architecture.
3. Responsible for gathering and defining the architecture requirements and for ensuring that the architectures are compatible and in compliance with the appropriate IT organization and project standards.
 |
| **Minimum Qualifications**For minimum qualifications, see the labor category description in the CATS+ RFP for the subject RFR labor category. In addition, qualified candidates must 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 evaluation.***All qualifications for certification must include a clause for “or equivalent, as determined by the PO”* |
| **Labor Category/s**  **(From Section 1 Above)** | **Minimum Qualifications** |
| 1. Project Manager (CATS+ Labor Category #2)
 | 1. Bachelor’s Degree from an accredited college or university in Engineering, Computer Science, Information Systems, or Business or other related discipline.
2. Master’s degree or project management certification is preferred.
3. At least five (5) years of experience in project management.
 |
| 1. Architect, Systems Design ( CATS+ Labor Category #64)
 | 1. Bachelor’s Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline. A Master's Degree is preferred
2. Must have six (6) years of experience planning, designing, building, and implementing mid-range IT systems.
 |
| **Preferred Qualifications**The additional Experience/Knowledge/Skills listed below are preferred by the State. |
| **Labor Category/s** | **Preferred Qualifications** |
| 1. Project Manager (CATS+ Labor Category #2)
 | 1. SAFe Agilist certification or equivalent, as determined by the PO.
2. Must have experience with implementing SeamlessDocs solutions.
3. Must have experience integrating with SeamlessDocs platform.
4. Must demonstrate a leadership role in at least three successful projects that were delivered on time and on budget.
 |
| 1. Architect,Systems Design ( CATS+ Labor Category #64)
 | 1. At least four (4) years of experience developing application, development, network, and technical architectures for mid-range client/server and mainframe applications.
2. Demonstrated ability to develop and execute architecture strategies and to perform feasibility studies and integration analyses.
3. Experience supervising and providing guidance in implementing various mid-range architectures and supporting implementation of large-scale applications.
4. Must have experience with SOAP, REST, JSON Web Services, and REST API Design.
5. Must have experience with data structures, data modeling, and DB schema.
6. Must have experience with enterprise and partner WSDL.
 |
| **Section 4 - Required Submissions****NOTE:** * 1. Master Contractors may propose only one candidate for each position requested.
	2. 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.
	3. 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 as a password protected file with “Technical”: Master Contractor Name, RFR number, & candidate name in the subject line. The password must be unique for each candidate e-mail.**1. Resume for each labor category described in the RFR (Attachment 1)
2. 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.
3. Conflict of Interest Affidavit (Attachment G in the CATS+ RFP)
4. Living Wage Affidavit (Attachment I in the CATS+ RFP)
5. Certification Regarding Investments in Iran (Attachment 4 of this RFR)
6. 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.**1. 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. |
| **Section 5 – Evaluation Criteria** Candidates meeting the Minimum Qualifications listed in Section 3 above will be evaluated for overall best value, as follows: |
| 1. Relevance of IT project management experience to minimum and preferred project management qualifications, labor category requirements, and project management duties and responsibilities (as described in Attachment 3).
 |
| 1. Relevance of personnel’s preferred qualifications, labor category requirements, and project management duties and responsibilities (as described in Attachment 3).
 |
| 1. Ability to clearly communicate as demonstrated in the interview
 |
| 1. Training and education as it relates to minimum and preferred qualifications, labor category requirements, and project management duties and responsibilities (as described in Attachment 3).
 |
| 1. Price
 |
| **Basis for Award Recommendation**The Agency 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 is considered to have greater weight. The Agency 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 # 060B3490015

|  |
| --- |
| 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.each proposed candidate. |
| Labor Category (from Section 1 of the RFR) | **Project Manager (Technical)** |
| Candidate Name: |  |
| Master Contractor:  |  |

1. **Education / Training**

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

1. **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]****[Title / Role]****[Period of Employment / Work]****[Location]****[Contact Person (Optional if current employer)]** | *Description of Work…* |
| **[Organization]****[Title / Role]****[Period of Employment / Work] [Location]****[Contact Person]** | *Description of Work…* |
| <add lines as needed> |  |

1. **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> |  |  |  |

1. **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?** |
| **LABOR CATEGORY TITLE – PROJECT MANAGER (SENIOR)** |
| **Requirement** | **Candidate Relevant Experience \*** |
| **Education:** 1. Bachelor’s Degree from an accredited college or university in Engineering, Computer Science, Information Systems, Business or other related discipline.
 | **Education:** |
| **General Experience:** 1. At least five (5) years of experience in project management
2. PMI certification as a PMP.
 | **General Experience:**  |
| **Specialized Experience:** 1. At least five (5) years of experience in managing IT related projects
2. Must demonstrate a leadership role in at least three successful projects that were delivered on time and on budget.
 | **Specialized Experience:**  |
| *Describe additional professional experience, knowledge, and skills required for this position.* |  |

The information provided on this form for this labor category is true and correct to the best of my knowledge:**Master Contractor Representative:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Print Name Signature Date**Proposed Individual:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Signature Date *Instruction: Sign each form.* |
| **ATTACHMENT 2****PRICE PROPOSAL** RFR # 060B3490015(This form is to be filled out by Master Contractors - Submit as the Financial Response with password protection)

|  |  |  |  |
| --- | --- | --- | --- |
| CATS+ Labor Category | A | B | C |
| Fully Loaded Hourly Labor Rate | EvaluationHours | Extended Price(A x B) |
| Project Manager (CATS+ Labor Category #2)  | $ | 1,000 | $ |
| Architect, Systems Design (CATS+ Labor Category #64) | $ | 1,000 | $ |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
|   |  |   |   |   |
| Authorized Individual Name |  |   | Company Name |
|  |  |   |   |   |
|   |  |   |   |   |
| Title |  |   | Company Tax ID # |
|  |  |   |  |   |
| Signature |  |   | Date |
|   |  |   |   |   |
| \*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 1920 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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| **ATTACHMENT 3****RFR #060B3490015****TECHNICAL PROJECT MANAGER (TPM)****DUTIES & RESPONSIBILITIES** This is a detailed description of typical Technical Project Manager (TPM) duties, responsibilities, and deliverables. Agencies should review and edit this document according to the specific TPM assignment and requirements for the project. References to a specific project can be inserted where the term [Project Name] occurs. Additionally, target due dates for deliverables defined in Section 7 should be adjusted to fit project needs. This information is advisory and some elements may not apply to specific Agencies or Projects. Questions about this SOW and the RFR process in general may be directed to the DoIT Procurement office at itpo.doit@maryland.gov.  |
| 1. **ROLE DEFINITIONS**The purpose of this section is to distinguish among the roles interacting with the TPM obtained through this RFR.
 |
|  | Task Order (TO) Procurement Officer – State staff person responsible for managing the RFR process up to the point of TO award.  |
|  | TO Manager – State staff person who oversees the SPM’s work performance and administers the TO once it is awarded.  |
|  | TO Contractor – The CATS+ Master Contractor awarded a TO as a result of this RFR. The TO Contractor shall provide the SPM resource and be accountable for SPM work performance under the TO.  |
|  | Technical Project Manager (TPM) – The person provided by the TO Contractor as a result of this RFR. The TPM is responsible for overall technical project planning and execution. The TPM is responsible for performing the duties and responsibilities described in Attachment 3, and for completing all assigned tasks and deliverables under the TO. The TPM reports directly to the Senior Project Manager and shall oversee and direct the Technical Project Teams members made up of State and contractual personnel.  |
|  | Other Project Contractors – The Contractors responsible for project implementation, including their PM and other personnel assigned to the project. The Contractors report to the PM for project purposes with oversight by the TO Manager.  |
| 1. **TECHNICAL PROJECT MANAGER DUTIES AND RESPONSIBILITIES**
 |
| The TPM shall oversee and direct the technical project teams comprised of current State and contractual personnel. Responsibilities include overall project governance and direction, technical architecture, and risk management as needed. Duties shall focus on technical project monitoring, project execution, project control, team integration, change integration, and corrective action as needed. The position shall ensure the application of PMI and State SDLC standards in managing the project.The TPM shall report to the Senior Project Manager and perform the tasks described in the table below. The TPM shall be capable of performing all assigned tasks with self-sufficiency and minimal guidance from the Senior Project Manager. TPM performance shall be rated by the State each month, based on performance in the nine PMBOK knowledge areas as applied to the Project, and the quality of the written deliverables described in Section 7 below (See Exhibit 1 – Deliverable Product Acceptance Form for performance rating criteria). The TPM shall be accountable for the creation of any and all written deliverables that do not exist for the project, and for the updating of those that do exist. The TPM shall ensure that all deliverables are consistent with standards in the Project Management Institute (PMI) Project Management Body of Knowledge (PMBOK) and State of Maryland System Development Life Cycle (SDLC) (see Section 3 below). |
| **TPM Project Management Duties**An asterisk (\*) by the section number below and bold italics identifies a deliverable associated with the duty / responsibility. Refer to Section 7 for full descriptions of all deliverables and time of performance. |
|  | 1. Become thoroughly knowledgeable on all aspects of the Project including technical knowledge of software applications being utilize by the project.
 |
|  | 1. Provide guidance and oversight on all aspects of Technical Project Teams (Data warehouse, Portal, Integration, Development, Conversion, Configuration Management and others). Provide guidance on technical aspects of project to include:
2. Technical Architecture (Hardware, System Security, Data Warehouse, Portal, Network and etc.)
3. Programming Standards and Guidelines in compliance with State of Maryland
4. Development methodology, frameworks and project tools
5. Technical and Non-functional requirements analysis and management
 |
|  | 1. Perform Technical Project Management consistent with PMI and PMBOK principles of project management and the State of Maryland SDLC.
2. Manage and integrate project resources including oversight of the technical project team.
3. Exercise PM best practices for the project and oversee project activities consistent with the nine knowledge areas including:
4. Procurement Management - consisting of procurement planning, contracts planning, authoring solicitations, evaluation, requesting solicitation responses, selecting contractor(s), administering contract(s), and contract(s) closing activities.
5. Schedule Management - consisting of activity definition and sequencing, resource estimating, duration estimating, schedule development, and schedule control activities.
6. Integration Management - consisting of project plan development, project plan execution, and integrated change control activities.
7. Scope Management - consisting of project initiation, scope planning, scope definition and scope change control activities.
8. Cost Management - consisting of resource planning, cost estimating, budgeting and cost control activities.
9. Human Resources Management - consisting of organizational planning, technical project team acquisition and staff development activities.
10. Risk Management - consisting of risk management planning, risk identification, risk quantitative and qualitative analysis, response planning, monitoring, and control activities.
11. Quality Management - consisting of quality planning, quality assurance and quality control activities.
12. Communications Management - consisting of communications planning, information distribution, progress and performance reporting, and stakeholder communications management activities.
 |
| * 1. \*
 | 1. Review and provide input and updates to the ***Project Management Plan (Deliverable 7.1).***
2. Ensure that plan components adequately document how the project will be executed, monitored and controlled.
3. Ensure that the plan adequately defines the managerial, technical, and supporting processes and activities necessary for sound project development.
4. Ensure that the plan adequately covers topics such as Scope Management, Schedule Management, Quality Management, Resource Management, Communications Management, Project Change Management, Risk Management, Procurement Management and others as deemed necessary to manage the project.
 |
| * 1. \*
 | 1. Review and provide input and updates to the ***Work Breakdown Structure (WBS) (Deliverable 7.2)*** consistent with PMBOK standards for all project work.
 |
| * 1. \*
 | 1. Review and provide input and updates to the ***Integrated Master Schedule (Deliverable 7.3)*** based on the WBS (see 2.5 above) and usable for tracking project activities.
2. This schedule shall include all project management, agency and contractor activities in sufficient detail to manage the project.
3. The schedule shall include milestones, deliverables, periods of performance, degrees of completion, and assigned resources for all project activities.
4. The activities duration in the master schedule shall be at appropriate level of granularity to manage and track project progress.
 |
| * 1. \*
 | 1. Review and provide input and updates to the ***Communications Management Plan (Deliverable 7.4)*** for all project stakeholders.
2. Include stakeholder contact list, distribution structure, description of information to be disseminated, schedule listing when information will be produced and method for updating the communications plan.
3. Ensure all appropriate stakeholders have been identified and their requirements and expectations have been documented and managed within the scope of the project.
 |
| * 1. \*
 | 1. Review and provide input and updates to the ***Risk Management Plan (RMP) and Risk Registry (Deliverable 7.5)***.
2. At a minimum the RMP shall:
3. Identify and prioritize potential risks to successful completion of the SDLC Phases.
4. Incorporate pertinent risk information found in the Master Project Status Report (see 2.15 below).
5. Include a Risk Registry of all project risks that will be updated throughout the project.
 |
|  | 1. Develop, document and implement escalation and resolution processes for the project and communicate the process to all stakeholders.
 |
| * 1. \*
 | 1. Ensure the Technical Project Team has created and is updating a ***Deliverable Comments Matrix (DCM) (Deliverable 7.6)*** for each deliverable or SDLC product provided by each Project Contractor’s primary point of contact.
2. Ensure that the Technical Project Teams review, and coordinates the review among appropriate stakeholders, of Project deliverables for completeness and conformance to requirements.
3. Ensure the Technical Project Team documents resulting issues and questions in the DCM to be resolved by the Development Contractor prior to deliverable acceptance.
4. Ensure the Technical Project Team reviews subsequent updated versions of deliverables to confirm all issues and questions have been resolved satisfactorily.
5. The DCM process is part of the Quality Management Plan (see 2.13 below).
 |
| * 1. \*
 | 1. Review and provide input and updates to the ***Change Management Plan (Deliverable 7.7)*** that describes the process for making changes to project scope, requirements, or cost as necessary.
2. At a minimum, the Change Management Plan shall:
3. Describe the change management and approval processes to include:
	1. Coordination with the TO Procurement Officer to define change order scope, cost, and project impact of proposed changes to the project;
	2. Coordination with the TO Manager for review and approval of proposed changes to the project;
	3. Coordination with the Technical Project Team and any Contractors for review and agreement on proposed changes;
	4. Coordination with the TO Manager and any Contractors for documentation and implementation of change orders; and
	5. Project integration management consistent with the PMBOK for approved changes.
4. Describe the tools used (i.e. change request form change order, change log).
 |
| * 1. \*
 | 1. Review and provide input and updates of the Requirements Traceability Matrix (RTM) (Deliverable 7.8) that describes and provides a numbering system for all project requirements for traceability through testing. The RTM process is part of the Quality Management Plan (see 2.13 below).
2. The RTM shall include test scenarios and acceptance criteria for all technical and functional requirements.
3. Ensure that the Project Team participates in requirements development as needed and traces requirements through testing and implementation via updates to the RTM.
4. Ensure that RTM updates are in conjunction with weekly requirements / design reviews (see 2.15 below).
5. Work closely with the Project Team and any Contractors to develop or review and update detailed project requirements. Requirements activities may include:
6. Stakeholder interviews;
7. Documenting before and after business processes;
8. Review of existing requirements documentation;
9. Joint Application Development (JAD) sessions;
10. COTS software “gap fit analysis”;
11. Demonstrations of existing similar systems (benchmarking); and
12. Requirements walkthroughs
 |
| * 1. \*
 | 1. Review and provide input and updates to the Quality Management Plan (Deliverable 7.9).
2. At a minimum the QMP shall:
3. Describe the process for quality management of project deliverables via the DCM process (see 2.10 above).
4. Describe the process for quality management of requirements using the RTM (see 2.12 above).
5. Describe the processes for quality management of testing, software development and configuration management, as applicable.
6. Develop a written procedure for configuration control for application code promotion.
 |
| * 1. \*
 | 1. Ensure creation and ongoing updating of the PM Status Report and Timesheet (Deliverable 7.10).
2. At a minimum, the PM Status Report and Timesheet shall:
3. Report on completed and planned project activities for the reporting period,
4. Highlight schedule deviation from baseline,
5. Provide schedule updates, progress of work being performed, milestones attained, resources expended,
6. Document risks, and issues encountered and corrective actions taken
7. Track project cost and expenditures
 |
| * 1. \*
 | 1. Ensure input and ongoing updating to the Master Status Report (Deliverable 7.11). Oversee weekly Technical Project Team meetings, to include any Contractors when appropriate.
2. TheMaster Status Report shall contain sections for the following:
3. Lessons learned from the project and any other pertinent status information.
4. Design / requirements reviews and discussions on project status.
5. Project status, risk and issue dispositions for the past week, and planned activities for the week upcoming.
6. PM activities and needed updates to the Integrated Master Schedule (see 2.6 above), Master RMP (see 2.8 above), and RTM (see 2.12 above).
7. Performance as measured against the Project Schedule.
 |
|  | 1. Ensure project governance and control according to the Project Management Plan (see 2.4 above).
2. Work with the Technical Project Teams and any Contractors’ technical resources to address schedule variances.
3. Ensure the documentation of schedule variances in the Integrated Master Schedule (see 2.5 above) and Master Status Report (see 2.15 above).
 |
|  | 1. Ensure that the TechnicalProject Teams will collect, organize, store, and manage project documents in a central repository. This includes:
2. Maintaining current and archival files (electronic and paper)
3. Collecting and distributing information to and from stakeholders
4. Entering updates into project tracking systems
 |
|  | 1. Function as a liaison between Agency personnel, project stakeholders, the Development Contractor’s technical resources and Technical Project Teams.
 |
|  | 1. Assign other minor duties related to project management support to the Technical Project Team. Minor duties may include:
2. Responding to phone calls and email
3. Making photo copies
4. Scheduling and attending ad hoc meetings
5. Engaging in TO performance discussions
6. Coordinating Development Contractor invoicing
7. Participating in Independent Verification & Validation (IV&V) assessments.
 |
| * 1. \*
 | 1. Review and provide input to the Human Resource Management Plan (Deliverable 7.12).
2. At a minimum, the Human Resource Management Plan shall:
3. Identify project tasks and assignments and work with Agency and any Contractors to resolve workload conflicts.
4. Define roles and responsibilities needed for each resource on the project.
5. Provide projections for resource and resource utilization.
6. Define staff acquisition strategy including backfilling of State resources if applicable.
7. Document staff training plan if required.
8. Define organizational structure based on resources.
 |
| * 1. \*
 | 1. Review and provide input to the Schedule Management Plan (Deliverable 7.13).
2. At a minimum, the Schedule Management Plan shall:
3. Document tools the project will use to manage the schedule and frequency of updates.
4. Define process for how schedule shall be tracked and reported including metrics used to report overall schedule performance.
5. Define process for schedule change process, including the process for baselining schedule and approving schedule changes.
 |
| * 1. \*
 | 1. Review and provide input to the Cost Management Plan (Deliverable 7.14).
2. At a minimum, the Cost Management Plan shall:
3. Establish the activities and criteria for planning, structuring, and controlling project costs.
4. Establish the project cost baseline through cost estimation and budget determination.
5. Define cost estimating and cost controls for the project.
6. Define and document how costs and cost variances will be reported regularly.
 |
| * 1. \*
 | 1. Review and provide input to the Procurement Management Plan (Deliverable 7.15).
2. At a minimum, the Procurement Management Plan shall:
3. Define the procedures for how the project will purchase or acquire all products and services needed from outside the team to perform project tasks
4. Document procurement management activities for the project.
5. Document contract management activities for the project
 |
|  | 1. Ensure secure data capture, transfer and storage for the [System Name] system.
 |
|  | 1. Coordinate, setup and support configuration of multiple system environments (Production, Staging/Test, DR).
 |
|  | 1. Identify project tasks and assignments and work with Agency, Development Contractor’s Technical resources, and Project Technical Teams to resolve workload conflicts.
 |
|  | 1. Work closely with the Technical Project Teams and Development Contractor’s Technical resources to develop or review and update detailed project documents.
2. Documents may include:
	1. Hardware Evaluation;
	2. Architecture and Technical Strategy Documents;
	3. Design Specification Documents;
	4. Detail Design Documents;
	5. Software Development Document;
	6. Joint Application Development (JAD) Document;
	7. Technical Process Definition and Requirements
	8. Security Plan;
	9. Data Conversion Strategy and Plan
	10. Technical Process Definition and Requirements
	11. Data Retention Plan;
	12. Disaster Recovery Plan;
	13. Integration Document;
	14. Implementation Plan;
	15. Operations or System Administration Manual;
	16. Maintenance Manual; and
	17. Release Notes
 |
|  | 1. Be responsible for managing the integrated project schedule and keeping the project schedule updated on a weekly basis. The TPM shall gather updates to the task activities and report to the Senior Project Manager on all schedule variances.
 |
|  | 1. Other project-related duties as assigned by TO Manager.
 |
|  |  |
| 1. **REQUIRED PROJECT POLICIES, GUIDELINES AND METHODOLOGIES**
 |
| The TPM 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 TPM 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: |
|  | The nine project management knowledge areas in the PMI’s PMBOK. |
|  | The State’s SDLC methodology at: www.doit.maryland.gov - keyword: SDLC.  |
|  | The State’s IT Security Policy and Standards at: www.DoIT.maryland.gov - keyword: Security Policy.  |
|  | The State’s IT Project Oversight at: www.DoIT.maryland.gov - keyword: IT Project Oversight. |
| 1. **SUBSTITUTION OF PERSONNEL**
 |
|  | DIRECTED PERSONNEL REPLACEMENT1. 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 Department or Agency, Contract, or RFR requirement.
2. 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.
3. 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.
4. 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 of the contractor personnel with less than fifteen (15) days’ notice, the TO Manager can direct removal in shorter timeframe, including immediate removal.
5. 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.
6. 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.
 |
|  | SUBSTITUTION OF PERSONNEL PRIOR TO RFR EXECUTION (AND UP TO 30 DAYS AFTER RFR EXECUTION)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.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. |
|  | SUBSTITUTION AFTER 30 DAYS POST RFR EXECUTIONThe procedure for substituting personnel after RFR execution is as follows: ***It is acceptable to reference the procedures in the CATS+ RFP instead of the language below:*** 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.
 |
| 1. **WORK HOURS**
 |
|  | The TPM will work an eight-hour day between the hours of 7:00 AM and 6:00 PM, Monday through Friday except for State holidays and Service Reduction days or other office closures, or an alternate work schedule with prior approval of the Agency TO Manager.  |
|  | Alternatively, at the sole discretion of the TO Manger, the TPM may follow DoIT’s compressed work week schedule.  |
|  | Duties also may require some evening and/or weekend hours billed on actual time worked at the proposed hourly rate. |
| 1. **TECHNICAL PROJECT MANAGER DELIVERABLES AND TIME OF PERFORMANCE**
 |
| *Note – for each of the written deliverables below, ongoing quality will be a factor in the Monthly Performance Rating described in Section 4 above.* |
| **ID #** | **Deliverable Description**  | **Acceptance Criteria** | **Time of Performance** |
|  | ***Project Management Plan***  | MS Word document (or mutually agreed upon document) that defines how the project will be executed, monitored and controlled. The document will be developed with input from the project team and key stakeholders. The plan should address topics including Scope Management, Schedule Management, Financial Management, Quality Management, Resource Management, Communications Management, Project Change Management, Risk Management, and Procurement Management as defined in the PMBOK. The Project Management Plan shall comply with Maryland’s SDLC and Attachment 2, Section 2 requirements for the deliverable. | Updated quarterly or as directed by the TO Manager |
|  | ***Work Breakdown Structure (WBS)***  | MS Word or Excel document (or mutually agreed upon document) that contains tiers showing project milestones or phases in the top level with a breakdown of major project tasks into manageable “work packages” underneath. Work packages at the bottom level should have no smaller than two-week durations and have measurable, testable, or observable outputs suitable for tracking project progress. The WBS shall comply with Maryland’s SDLC and Attachment 2, Section 2 requirements for the deliverable. | Updated quarterly or as directed by the TO Manager |
|  | ***Integrated Master Schedule***  | MS Project document (or mutually agreed upon document) that is based on the WBS (see 6.2 above) and suitable for tracking project activities. At a minimum, the Master Schedule shall show milestones, deliverables, times of performance, degrees of completion and resources for all project activities during the SDLC. The activities durations in the master schedule should have the appropriate degree of granularity to manage and track project progress. This is a single, base-lined and periodically updated deliverable encompassing all project activities. The Integrated Master Schedule shall comply with Maryland’s SDLC and Attachment 2, Section 2 requirements for the deliverable. | Update bi-weekly or as directed by the TO Manager |
|  | ***Communications Management Plan***  | MS Word document (or mutually agreed upon document) that captures the stakeholder contact list, the types of information to be disseminated, the format for each type, a schedule of when information will be produced and disseminated, and the method for updating the communications plan. This is a single deliverable maintained throughout the life of project. The Communications Plan shall comply with Maryland’s SDLC and Attachment 2, Section 2 requirements for the deliverable. | Updated quarterly or as directed by the TO Manager |
|  | ***Risk Management Plan (RMP) and Risk Registry***  | MS Word or Excel document (or mutually agreed upon document) that describes the risk management procedures for the project. The RMP will include a table of potential risks and recommended risk responses, and will incorporate risk information found in deliverables provided by the Development Contractor. This is a single, periodically updated deliverable encompassing all project risks. A ***Risk Registry*** will be created for logging all project risk using MS Excel or other appropriate table format. The Risk Management Plan shall comply with Maryland’s SDLC and Attachment 2, Section 2 requirements for the deliverable. | Update bi-weekly or as directed by the TO Manager |
|  | ***Deliverable Comments Matrix (DCM)***  | MS Word or Excel document (or mutually agreed upon document) that is used to capture comments and recommended changes to each Project deliverable prior to acceptance. A separate DCM is required for each deliverable or SDLC product. The DCM shall comply with Attachment 2, Section 2 requirements for the deliverable. | Project deliverable due date + 5 working days  |
|  | ***Change Management Plan***  | MS Word document (or mutually agreed upon document) that describes the procedure for proposing, evaluating, approving, and documenting changes to project scope, schedule, and cost. This Plan should include any tools or templates used for change management, for example, change request form. The Change Management Plan shall comply with Maryland’s SDLC and Attachment 2, Section 2 requirements for the deliverable. | Updated quarterly or as directed by the TO Manager |
|  | ***Requirements Traceability Matrix (RTM)***  | MS Word or Excel document (or mutually agreed upon document) that describes technical and functional requirements. At a minimum, requirements should be numbered for traceability, testable and the descriptions unambiguous. The RTM should contain acceptance criteria for each requirement and a test method for verifying completion based on the criteria. The RTM shall comply with Maryland’s SDLC and Attachment 2, Section 2 requirements for the deliverable. | Updated bi-weekly or as directed by the TO Manager |
|  | ***Quality Assurance (QA) Plan***  | MS Word document (or mutually agreed upon document) that describes how quality, meaning conformance to project requirements, will be monitored throughout the project life cycle. The QA Plan should describe the steps for deliverable review and updating via the DCM process (see6.6 above). The QA Plan should describe the requirements tracking process via the requirements traceability process (see 6.8 above). The QA plan should define signoff procedures for project milestones and deliverables. The Quality Assurance Plan shall comply with Maryland’s SDLC and Attachment 2, Section 2 requirements for the deliverable. | Updated quarterly or as directed by the TO Manager |
|  | ***Project Manager Status Report and Timesheet***  | MS Word document (or mutually agreed upon document) that captures and tracks ongoing PM 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 identified on the project and the status of efforts to resolve issues. | At least bi-weekly or as directed by the TO Manager |
|  | ***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 period, the completion status of project deliverables and status of Project costs (planned vs. actual). The report will describe issues identified on the project and the status of efforts to resolve issues and mitigate risks. The report will have sections describing necessary updates to the Integrated Master Schedule (Deliverable 6.3) and Risk Registry (Deliverable 6.5). 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 |
|  | ***Human Resource Management Plan*** | MS Word or Excel document (or mutually agreed upon document) that describing how and when human resource requirements will be met on the project. The plan shall consider resource needs for the full life of the system including operations and maintenance and address staff acquisition, timing and training needs. The Human Resource Management Plan shall comply with Maryland’s SDLC and Attachment 2, Section 2 requirements for the deliverable. | To be determined by the Senior Project Manager |
|  | ***Schedule Management Plan*** | MS Word document (or mutually agreed upon document) that establishes the specific procedures for how the project schedule will be managed and controlled and is as detailed as necessary to control the schedule through the life cycle based on the size, risk profile, and complexity of the project. The Schedule Management Plan shall comply with Maryland’s SDLC and Attachment 2, Section 2 requirements for the deliverable. | To be determined by the Senior Project Manager |
|  | ***Cost Management Plan*** | MS Word document (or mutually agreed upon document) that establishes the activities and criteria for planning, structuring, and controlling project costs. The Cost Management Plan shall comply with Maryland’s SDLC and Attachment 2, Section 2 requirements for the deliverable. | To be determined by the Senior Project Manager |
|  | ***Procurement Management Plan*** | MS Word document (or mutually agreed upon document) that define the procedures to purchase or acquire all products and services needed from outside the team to perform project tasks. The document shall define processes for plan purchases and acquisitions including acquisition strategy, contract administration, and contract closure. The Procurement Management Plan shall comply with Maryland’s SDLC and Attachment 2, Section 2 requirements for the deliverable. | To be determined by the Senior Project Manager |

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**ATTACHMENT 4 - CERTIFICATION REGARDING INVESTMENTS IN IRAN**

**Authority:** State Finance & Procurement, §§17-701 – 17-707, Annotated Code of Maryland [Chapter 447, Laws of 2012.]

**List:** The Investment Activities in Iran list identifies companies that the Board of Public Works has found to engage in investment activities in Iran; those companies may not participate in procurements with a public body in the State. “Engaging in investment activities in Iran” means:

1. Providing goods or services of at least $20 million in the energy sector of Iran; or
2. For financial institutions, extending credit of at least $20 million to another person for at least 45 days if the person is on the Investment Activities In Iran list and will use the credit to provide goods or services in the energy of Iran.

***The Investment Activities in Iran list is located at: www.bpw.state.md.us***

**Rule:** A company listed on the Investment Activities In Iran list is ineligible to bid on, submit a proposal for, or renew a contract for goods and services with a State Agency or any public body of the State. Also ineligible are any parent, successor, subunit, direct or indirect subsidiary of, or any entity under common ownership or control of, any listed company.

*NOTE: This law applies only to new contracts and to contract renewals. The law does not require an Agency to terminate an existing contract with a listed company.*

CERTIFICATION REGARDING INVESTMENTS IN IRAN

The undersigned certifies that, in accordance with State Finance & Procurement Article, §17-705:

(i) it is not identified on the list created by the Board of Public Works as a person engaging in investment activities in Iran as described in §17-702 of State Finance & Procurement; and

(ii) it is not engaging in investment activities in Iran as described in State Finance & Procurement Article, §17-702.

The undersigned is unable make the above certification regarding its investment activities in Iran due to the following activities:

Name of Authorized Representative: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Authorized Representative: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_ Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Witness Name (Typed or Printed): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Witness Signature and Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_