

STATE BOARD OF ELECTIONS

P.O. BOX 6486, ANNAPOLIS, MD 21401-0486 PHONE (410) 269-2840

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 Administrator

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Amendment #1
Task Order Request for Proposals
Voting System Project Resources (CATS+) # D38B4400009

Ladies/Gentlemen:

This Amendment #1 is being issued to amend and clarify certain information contained in the above referenced TORFP. All information contained herein is binding on all Offerors who respond to this TORFP. Specific parts of the TORFP have been amended. The following changes/additions are listed below; new language has been double underlined and marked in bold (i.e., **word**) and language deleted has been marked with a strikethrough (i.e., ~~word~~).

1. Revise KEY INFORMATION SUMMARY SHEET page 5 as follows:

Questions Due Date and Time:	12/30/2013 <u>01/06/2014</u> at 2:00 PM Local Time in Annapolis MD
Closing Date and Time:	01/06/2014 <u>01/15/2014</u> at 2:00 PM Local Time in Annapolis MD

2. Revise Section 1.10, on page 8 as follows:

If the TO Contractor is required to perform work beyond the scope of Section 2 of this TORFP, or there is a work reduction due to unforeseen scope changes, a TO Change Order is required. The TO Contractor and TO Manager shall negotiate a mutually acceptable price modification based on the TO Contractor's proposed rates in the Master Contract and scope of the work change. No scope of work changes shall be performed until a change order is approved by ~~DOIT~~ **SBE** and executed by the TO Procurement Officer.

3. Revise Section 2.1, on page 11 as follows:

As part of the evaluation of the proposal for this TO, Master Contractors shall propose exactly three (3) named resources and shall describe in a Staffing Plan how additional resources shall be acquired to meet the needs of the SBE. SBE expects three (3) resources to be available at NTP and SBE will initiate a work order to obtain additional resources as required during the performance of the TO. At the time of award, the ~~Offer~~ **Offeror** shall provide one (1) named resource for each of the full-time resource types listed below:

Amendment #1
Task Order Request for Proposals
Voting System Project Resources (CATS+) # D38B4400009

4. Revise Section 2.6.1, on page 13 as follows:

Resource Types requested in conjunction with the issuance of this TORFP shall be based upon the CATS+ Labor Categories listed in the Project Resources Table 2.1 below. The need for the initial three (3) resources described in Section ~~2.6.5.1~~ **2.6.5** shall be immediate upon NTP, and all subsequent requests for resources shall be initiated through the Work Order Process. To be responsive to this TORFP, Offerors shall be capable of providing the initial three (3) personnel resources referenced in Section 2.1 that meet the minimum qualifications for the labor categories listed in Table 2.1 – Project Resources. Additional resources added via the Work Order Process shall also meet minimum qualifications of the labor categories proposed in the Work Order. **Offerors shall submit a Price Proposal (Attachment 1) that provides labor rates for all categories in Table 1 – Project Resources)**

5. Revise Table 2.1, on page 14 as follows:

15	Training Coordinator	Training Specialist/ Coord inator Instructor	1	JAN 2015	DEC 2016
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6. Revise Section 2.6.5.1 Senior Business Process Consultant, on page 19 as follows:

Preferred Requirements

- ~~Must have~~ **Prefer** prior Business Process Consulting experience with a State of Maryland entity
- Shall be able to provide examples of business process documentation that they have developed as primary author for other State Agencies.
- ~~Must have~~ **Prefer** demonstrable experience in creating Maryland SDLC deliverables for a successful Maryland Agency project.
- ~~Must have~~ **Prefer** experience in performing business process analysis and producing the corresponding business and system work flow diagrams.
- Demonstrate the ability to facilitate and record workgroup sessions with Subject Matter Experts (SMEs)

7. Revise Section 2.6.5.2 Voting System Business Analyst, on page 20 as follows:

Preferred Requirements

- ~~Must have~~ **Prefer** prior Business Process Consulting experience with a State of Maryland entity
- Shall be able to provide examples of business process documentation that they have contributed to the development of for other State Agencies.
- ~~Must have~~ **Prefer** demonstrable experience in creating Maryland SDLC deliverables for a successful Maryland Agency project.
- ~~Must have~~ **Prefer** experience in performing business process analysis and producing the corresponding business and system work flow diagrams.
- Demonstrate the ability to facilitate and record workgroup sessions with Subject Matter Experts (SMEs)

Amendment #1
Task Order Request for Proposals
Voting System Project Resources (CATS+) # D38B4400009

8. Revise Section 2.6.5.3 Project Administrator, on page 21 as follows:

Preferred Requirements

- Demonstrate command of the Microsoft Office Suite components
- ~~Must have~~ **Prefer** the ability to create detailed business meeting agendas within 24 hours of the start of scheduled meetings
- ~~Must be capable~~ **Prefer the capability** of taking detailed meeting minutes and distributing them within 24 hours of the meeting conclusion.
- Possess the ability to consolidate project productivity data into cohesive reports for financial and resource tracking.

9. Revise Section 2.9.1 OFFEROR’S COMPANY MINIMUM QUALIFICATIONS, on page 26 as follows:

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

1) The Offeror shall have provided personnel resources from a minimum of 15 different ~~resources~~ **resource types** over the course of at least one (1) major IT project. In addition:

a) The project shall have lasted at least three (3) years;

b) The Offeror shall have ~~previously~~ provided at least twelve (12) full-time project resources simultaneously in support of the major IT project. The major IT project shall have been valued at \$10M or greater.

10. Revise Attachment 1 Price Proposal Form, on page 40 as follows:

Job Title from TORFP	CATS+ Labor Category Proposed by Master Contractor	Hourly Labor Rate (A) Year 1	Hourly Labor Rate (B) Year 2	Hourly Labor Rate (C) Year 3	Hourly Labor Rate (D) Year 4	Hourly Labor Rate (E) Year 5	Total Class Hours (F) 2000 hrs/yr	Total Proposed CATS+ TORFP Price (G) (A+B+C+D+E)* F
Sr. Project Manager	Project Manager	\$	\$	\$	\$	\$	10,000	\$
Deputy Project Manager	Project Manager	\$	\$	\$	\$	\$	10,000	\$
Sr. Business Process Consultant	Business Process Consultant (Senior)	\$	\$	\$	\$	\$	10,000	\$

Amendment #1
Task Order Request for Proposals
Voting System Project Resources (CATS+) # D38B4400009

Job Title from TORFP	CATS+ Labor Category Proposed by Master Contractor	Hourly Labor Rate (A) Year 1	Hourly Labor Rate (B) Year 2	Hourly Labor Rate (C) Year 3	Hourly Labor Rate (D) Year 4	Hourly Labor Rate (E) Year 5	Total Class Hours (F) 2000 hrs/yr	Total Proposed CATS+ TORFP Price (G) (A+B+C+D+E)* F
Project Administrator	Program Administration Specialist	\$	\$	\$	\$	\$	10,000	\$
Voting System Business Analyst	Business Process Consultant (Senior)	\$	\$	\$	\$	\$	10,000	\$
Inventory Business Analyst	Business Process Consultant (Senior)	\$	\$	\$	\$	\$	10,000	\$
Sr. Marketing Consultant	Market Research Consultant (Senior)	\$	\$	\$	\$	\$	10,000	\$
Quality Manager	Quality Assurance Consultant (Senior)	\$	\$	\$	\$	\$	10,000	\$
Organizational Change Manager	Group Facilitator (Senior)	\$	\$	\$	\$	\$	10,000	\$
Voter Outreach Manager	Marketing Consultant (Senior)	\$	\$	\$	\$	\$	10,000	\$
Testers	Testing Specialist	\$	\$	\$	\$	\$	10,000	\$
Training Coordinator	Training Specialist/Coordinator	\$	\$	\$	\$	\$	10,000	\$
Trainers	Training Specialist/Instructor	\$	\$	\$	\$	\$	10,000	\$
Technical Writer	Technical Writer/Editor	\$	\$	\$	\$	\$	10,000	\$
Internet Web Developer	Architect, Internet/Web	\$	\$	\$	\$	\$	10,000	\$
Election Subject Matter Expert	Subject Matter Expert (Senior)	\$	\$	\$	\$	\$	10,000	\$
Warehouse Manager	Facility Operations Supervisor	\$	\$	\$	\$	\$	10,000	\$
Security Consultant	Security Data Specialist	\$	\$	\$	\$	\$	10,000	\$

Amendment #1
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Software Developer	Application Developer, Advanced Technology (Senior)	\$	\$	\$	\$	\$	10,000	\$
Sr. Marketing Consultant <u>Business Analyst</u>	Market Research Consultant (Senior) <u>Business Process Consultant (Senior)</u>	\$	\$	\$	\$	\$	10,000	\$
Security Consultant <u>Database Administrator</u>	Security Data Specialist <u>Database Management Specialist (Senior)</u>	\$	\$	\$	\$	\$	10,000	\$
Total Evaluated Price (Years 1 – 5) The sum of Column G	\$							

11. Revise Attachment 5, on page 59 as follows:

3) For each job title above, the Master Contractor shall complete one Attachment 5 form ~~and one Attachment 5A form~~ using the templates template provided. Alternate worksheets are not allowed. ~~The Attachment 5A Form TM1 is a separate form labeled Attachment 5A Form TM1 Requirements Qualification Traceability Matrix.xls.~~

4) Form Completion

a) Complete one Personnel Resume Summary (Attachment 5 Form LC1) per proposed person to present each proposed person's resume in a standard format.

b) Additional information may be attached to each Personnel Resume Summary that may assist a full and complete understanding of the individual being proposed.

c) ~~Instructions for Attachment 5A Form TM1 Requirements Qualification Traceability Matrix. Complete the following parts:~~

Amendment #1
Task Order Request for Proposals
Voting System Project Resources (CATS+) # D38B4400009

~~Part A) CATS+ Minimum Qualifications: For each job title above, the Master Contractor shall insert each specific minimum qualification requirement from the CATS+ Master Contract for the proposed labor category. Each minimum requirement shall be followed by one or more examples that demonstrate how the proposed resource meets the minimum requirement. Account for all minimum qualifications, including any experience, education, or professional certifications.~~

~~(1) Where there is a time requirement such as three months' experience, you shall provide the dates from and to showing an amount of time that equals or exceeds the mandatory time requirement. Enter multiple examples if necessary to show the required time is met using multiple experiences.~~

~~(2) Include the data to support the example within the table. Cross-referencing other cells within the matrix or other portions of the TO Technical Proposal shall only be allowed when referencing proof of certification provided elsewhere in the TO Technical Proposal. For example, proof of current Oracle Certified Professional status may be cross referenced from the matrix if a copy of the certification is submitted as part of the TO Technical Proposal.~~

Issued by
Keith E. Ross
Task Order Manager

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Amendment #2
Task Order Request for Proposals
Voting System Project Resources (CATS+) # D38B4400009

Ladies/Gentlemen:

This Amendment #2 is being issued to amend and clarify certain information contained in the above referenced TORFP. All information contained herein is binding on all Offerors who respond to this TORFP. Specific parts of the TORFP have been amended. The following changes/additions are listed below; new language has been double underlined and marked in bold (i.e., **word**) and language deleted has been marked with a strikethrough (i.e., ~~word~~).

1. Revise Section 2.1 on page 11 as follows:

Duties and responsibilities for the desired support resources are described in Section ~~2.5~~ **2.6.3**.

2. Revise Section 2.6.4. on pages 17 and 18 as follows:

2.6.4.7 **Senior Marketing Consultant** (Market Research Consultant-~~Senior~~, page ~~7166~~)

2.6.4.8 **Quality Manager** (Quality Assurance Consultant-~~Senior~~, page ~~7772~~)

2.6.4.10 **Voter Outreach Manager** (Marketing Consultant-~~Senior~~, page ~~7166~~)

2.6.4.12 **Training Coordinator** (Training Specialist/Instructor, page ~~8479~~)

2.6.4.13 **Trainers** (Training Specialist/Instructor, page ~~8479~~)

2.6.4.17 **Warehouse Manager** (~~Facilities Specialist—Lead~~ **Facility Operations Supervisor**, page ~~6460~~)

3. Revise Section 2.8.4, on page 25 as follows:

ID #	Deliverable Description	Acceptance Criteria	Due Date / Frequency
2.7.4.1	Semi-monthly timesheets	Timesheets shall meet requirements in section 2.6.4.17 <u>2.11.1</u> . Deliver in MS Office (2007 or later) format	Semi-monthly (covering days 1-15 of a month and 16 – last day of month)

Amendment #1
Task Order Request for Proposals
Voting System Project Resources (CATS+) # D38B4400009

4. Revise Section 3.3 on page 31 as follows:

SUMMARY OF ATTACHMENTS

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

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

- Attachment 2 - MBE Forms D-1 and D-2 - Signed PDF
- Attachment 4 – Conflict of Interest Affidavit and Disclosure - Signed PDF
- Attachment 5 ~~and Attachment 5A~~ - Labor Classification Personnel Resume Summary (Forms LC1 ~~and TM1~~) - Signed PDF
- Attachment 13 – Living Wage Affidavit of Agreement - Signed PDF
- Attachment 16 - Certification Regarding Investments in Iran - Signed PDF

5. Revise the Table in Section 3.4.1 on page 32 as follows:

Reference	Offeror Company Minimum Requirement	Evidence of Compliance
2.9.1.1	Have provided personnel resources from a minimum of 15 different resources <u>resource types</u> over the course of at least one (1) major IT project	
2.9.1.1(a)	The project referenced in 2.9.1.1 above shall have lasted for 3 years	
2.9.1.1(b)	Offeror shall have provided at least twelve (12) full-time project resources simultaneously in support of the referenced project. The major IT project shall have been valued at \$10M or greater.	

6. Revise Section 3.4.1 on page 33 as follows:

C) Proposed Personnel and TORFP Staffing

1) Complete and provide Attachment 5 – Labor Classification Personnel Resume Summary for each of the three (3) proposed resources (forms LC1 and TM1). The information should show:

- a) In Form LC1 - Each proposed person’s skills and experience as they relate to the Master Contractor’s proposed solution and Section 2 – Scope of Work.
- b) ~~In Form TM1—List how each proposed person’s background meets all minimum personnel requirements listed in this TORFP and the CATS+ Master Contract for the relevant labor category.~~

7. Revise Section 3.4.1, G) on page 33 as follows:

G) Master Contractor ~~and Subcontractor~~ Experience and Capabilities

8. Revise the List of Attachments on page 38 as follows

Attachment	Attachment Name	Applicable	Submit with Proposal?*
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Amendment #1
Task Order Request for Proposals
Voting System Project Resources (CATS+) # D38B4400009

Label		to this TORFP?	(Submit, Do Not Submit, N/A)
Attachment 2	Minority Business Enterprise Participation (Attachments D-1 – D-7)	Applicable	Submit with TO Financial Financial Technical Proposal

9. Revise Attachment 1 on page 40 as follows:

Job Title from TORFP	CATS+ Labor Category Proposed by Master Contractor	Hourly Labor Rate (A) Year 1	Hourly Labor Rate (B) Year 2	Hourly Labor Rate (C) Year 3	Hourly Labor Rate (D) Year 4	Hourly Labor Rate (E) Year 5	Total Class Hours (F) 2000 hrs/yr	Total Proposed CATS+ TORFP Price (G) (A+B+C+D+E)* F
Sr. Project Manager	Project Manager	\$	\$	\$	\$	\$	10,000	\$
Deputy Project Manager	Project Manager	\$	\$	\$	\$	\$	10,000	\$
Sr. Business Process Consultant	Business Process Consultant (Senior)	\$	\$	\$	\$	\$	10,000	\$
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Voter Outreach Manager	Marketing Consultant (Senior)	\$	\$	\$	\$	\$	10,000	\$
Testers	Testing Specialist	\$	\$	\$	\$	\$	10,000	\$
Training Coordinator	Training Specialist/ Coordinator of Instructor	\$	\$	\$	\$	\$	10,000	\$
Trainers	Training	\$	\$	\$	\$	\$	10,000	\$

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Voting System Project Resources (CATS+) # D38B4400009

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	Specialist/Instructor							
Technical Writer	Technical Writer/Editor	\$	\$	\$	\$	\$	10,000	\$
Internet Web Developer	Architect, Internet/Web	\$	\$	\$	\$	\$	10,000	\$
Election Subject Matter Expert	Subject Matter Expert (Senior)	\$	\$	\$	\$	\$	10,000	\$
Warehouse Manager	Facility Operations Supervisor	\$	\$	\$	\$	\$	10,000	\$
Security Consultant	Security Data Specialist	\$	\$	\$	\$	\$	10,000	\$
Software Developer	Application Developer, Advanced Technology (Senior)	\$	\$	\$	\$	\$	10,000	\$
Sr. Marketing Consultant <u>Business Analyst</u>	Market Research Consultant (Senior) <u>Business Process Consultant (Senior)</u>	\$	\$	\$	\$	\$	10,000	\$
Security Consultant <u>Database Administrator</u>	Security Data Specialist <u>Database Management Specialist (Senior)</u>	\$	\$	\$	\$	\$	10,000	\$
Total Evaluated Price (Years 1 – 5) The sum of Column G	\$							

10. Revise Attachment 5 on page 59 as follows:

~~Part B) Other TORFP Minimum Qualifications: For each job title above, the Master Contractor shall insert each specific minimum qualification requirement listed in the solicitation. Each minimum requirement shall be followed by one or more examples that demonstrate how the proposed resource meets the minimum requirement.~~

Amendment #1
Task Order Request for Proposals
Voting System Project Resources (CATS+) # D38B440009

~~Account for all minimum qualifications, including any experience, education, or professional certifications.~~

~~Part C) Other Personnel Requirements: After all minimum qualification requirements, the Master Contractor shall insert any other personnel requirements listed within this TORFP and describe how the proposed resource meets those requirements~~

11. Revise Attachment 5 Form LC1 on page 62 as follows:

~~B) Requirements Qualification Traceability Matrix~~

~~Complete the matrix (Attachment 5A) for each requirement listed for the position in either the CATS+ Master Contract and/or this TORFP.~~

Issued by
Whitney Faust
Procurement Officer