



Peter Franchot  
*Comptroller*

Dennis J. Krysiak, CPA  
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AMENDMENT #1 Issued: May 15, 2020

CONSULTING AND TECHNICAL SERVICES+ (CATS+)  
TASK ORDER REQUEST FOR PROPOSALS (TORFP) E00B0600036

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.

**1. QUESTION:**

**Answer:** The TORFP number is not showing up when we search for opportunities.

The items are published to the CATS+ TORFP Status Page:

<https://doit.maryland.gov/contracts/Pages/CATSPplusTORFPStatus.aspx>

**2. QUESTION:**

**Answer:** Is there any guidance you may be able to give us regarding this difficulty?

<https://doit.maryland.gov/contracts/Pages/CATSPplusHome.aspx>

Click the link "How to Become CATS+ Master Contractor"

**3. QUESTION:**

In the financial proposal (Attachment B), we see many empty rows with class hours 2000. Are we supposed to propose additional labor categories? If so, how would COM evaluate the financial proposal as each vendor may propose different additional labor categories?

**Answer:** Refer to Section 1.1 (page 1) for the list of Labor Categories. Section 3.12.4, 3.12.5, 3.12.6 and Section 2 TO Contractor Requirements: Scope of Work section 2.1

**See revised Attachment B**

**4. QUESTION:**

Is this a recomplete of an expiring contract? If so, who is the incumbent vendor and when is that contract set to expire?



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**Answer:** Math Tech is the incumbent.

The contract is set to expire in the Fall of 2020.

**5. QUESTION:**

**Answer:** If no incumbent, who is providing these services currently at COM?

MathTech is the incumbent and performing these services.

**6. QUESTION:**

**Answer:** How many resumes per Key personnel we could propose in our proposal?

For each key personnel. Section 3.12.7 Labor Categories (A)

**7. QUESTION:**

What is the expected start date for this contract?

**Answer:** Late or early Fall 2020. The start date will be specified in the Notice To Proceed (NTP) once the contract has been awarded. Written noticed will be sent by the TO Procurement Officer.

**8. QUESTION:**

Is there an incumbent?

**Answer:** Yes, there is an incumbent.

**9. QUESTION:**

It shows MBE Goal as 30% and what we need to provide for meeting the same in response to this TORFP (before winning the contract). Is **Attachment D alone sufficient? Are documents D-1c, D-2, D-3A/B required only if win the contract?**

**Answer:** See Section 7 TORFP Attachments and Appendices (page 32).

**10. When is form D-1B required?**



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**Answer:** Submit with the TO Proposal. The offeror must prove they have attempted to find a sub-contractor to work on the contract with your company before the Procurement Officer grants a MBE waiver.

### 11. QUESTION:

Section 4A refers to below but there is no additional requirement in that section. Are you referring to any other part of the document?

*TORFP Additional Requirements Minimum qualifications and required certifications as defined in Section 2.1 of this TORFP.*

For the offeror experience (stated below), is it sufficient to have worked with the tax department using temp staff augmentation mode or are you expecting the company to have implemented fixed bid projects for tax agencies? Is it ok if we have provided temp IT staff to tax agencies in the last 20 years?

Also are you expecting this experience for the company responding to have or the personnel proposing to have?

**Answer:** Fixed bid projects for tax agencies is preferred, but if temp staff augmentation mode was used it should be detailed and explanation how it was used and the contract name it was used on as a reference. Having provided temp ID staff to tax agencies in the last 20 years should not be an issue, but to be considered Key resources should meet the requirements under Section 1 in the TORFP.

### 12. QUESTION:

Is it required to submit a sample resume/ form with rates for Quality Assurance Consultant (Senior)(Non-Key) and Geographic Information Systems Specialist (Non-Key)?

Section 3.12.7 Labor Categories (A)

### 13. QUESTION:

When the due date for any questions for this particular TORFP would be due?

**Answer:** All TO questions are due May 22, 2020 at 10:00 am eastern time  
TO Proposal due (closing) June 1, 2020 at 10:00 am eastern time (see page ii)



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**14. QUESTION:**

Does have any incumbent contractor(s) currently working, or who recently worked, on this project?

If so, is the incumbent eligible to respond to this solicitation?

**Answer:** The Comptroller of Maryland is an equal opportunity employer and has many contractors working on the Data Warehouse/Business Intelligence Project. Currently, there is an incumbent contractor working in this capacity, if the incumbent meets the qualifications of the current TORFP that is being solicited then any contractor is eligible to respond.

**15. QUESTION**

Who is the current incumbent?

**Answer:** MathTech, Inc

**16. QUESTION**

Were there any performance issues that would result in the incumbent not being allowed to re-bid for this RFP?

**Answer:** No.

**17. QUESTION**

When is the anticipated award for this contract?

**Answer:** Fall 2020

**18. QUESTION**

Can you provide a list of the vendors who have expressed an interest to bid?

**Answer:** No

**19. QUESTION**

Would the Comptroller consider allowing this project to kick off with the resources working remotely due to COVID-19 restrictions?



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**Answer:** Due to COVID-19 restrictions, the State office buildings are currently closed. However, COM will provide update communication on how the kick-off will be handled.

## 20. QUESTION

Would the Comptroller consider recommendations to data warehousing tools in the response that hold better value for department scope of work?

**Answer:**

a. Is this a recomplete contract?

**Answer:** Yes, the current Math Tech, Inc contract expires 12/22/2020

b. Can you provide the incumbent's contact information?

**Answer:** Math Tech, Inc – Hamilton, NJ

c. What was the contract value of the original contract?

**Answer:** \$1,303,719.36

d. Can you provide a list of the vendors who have expressed an interest to bid

**Answer:** No

## 21. QUESTION

Will the State be publishing a list of potential Prime vendors for this response so that MBE's may be in contact with them about potential teaming?

**Answer:** It is up to Master Contractors/Prime to decide who they want to select to perform the work with them on the TORFP. I have provided the Office of Minority Business Enterprise MDOT website link to review a list of MDOT Directory of Certified MBE, DBE, SBE & ACOBE certified Firms.  
[https://mbe.mdot.maryland.gov/directory/search\\_select.asp](https://mbe.mdot.maryland.gov/directory/search_select.asp)

## 22. QUESTION

When the due date for any questions for this particular TORFP would be due?

**Answer:** All TO questions are due May 22, 2020 at 10:00 am eastern time

## 23. QUESTION



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Is it required to submit a sample resume/ form with rates for Quality Assurance Consultant (Senior)(Non-Key) and Geographic Information Systems Specialist (Non-Key)?

**Answer:** Only Key personnel at time of TORFP submission.

Click on the link below:

<http://www.doit.state.md.us/itmc/mcontractors.aspx?smc=15>

find your company name and click on view Labor Rates:

Go to the Labor Category listed in the TORFP and view the rates beginning at “Year 8”

#### 24. QUESTION

Is a contractor allowed to submit a bid for this TORFP even if they are currently working on another COMP contract?

**Answer:** Yes, there are No restriction how many contracts a company is currently working on for the Comptroller.

#### 25. QUESTION

Is there incumbent working on the tasks of this TORFP or is this a new initiative? If there is an incumbent, are they eligible to re-bid?

**Answer:** MathTech, Inc is the incumbent. Any Master Contactor listed under Functional Area 10 – IT Management Consulting Services is eligible to bid on this TORFP.

#### 26. QUESTION

When is this contract likely to be awarded?

**Answer: Fall 2020.**

#### 27. QUESTION

How many awards are anticipated?

**Answer:** One, See 2 TO Contractor Requirements: Scope of Work – section 2.1.2 (page 2)

#### 28. QUESTION

Will there be orals for the short listed for the bidders before the award?

**Answer: Yes**

**29. QUESTION**

Would the selected candidates go through interview process? In person? Skype?

**Answer:** Yes, Section 4.5 Oral Presentation (page 23)

**30. QUESTION**

When would the awardee start the project? What is the target start date?

**Answer:** Fall 2020

#	Page	Section	Question
1.	General	General	Is the COM entertaining proposals from staff augmentation firms? <b>Answer:</b> Any company is eligible to submit a proposal as long as they are a Master contractor.
2.	3	Section 2.4	Are the positions listed in Section 2.4 full time positions? <b>Answer:</b> Section 3.12.11 Work Hours (page 17)
3.	3	Section 2	Can the COM confirm that all work is to be conducted on-site at Maryland's Treasury Building in Annapolis? <b>Answer:</b> Due to the current events, COM will be flexible will contractor's on-site presence
4.	3	Section 2	Would the COM consider a proposal that includes a combination of on-site and remote work? <b>Answer:</b> Yes, the COM will review a proposal that includes a combination of on-site and remote work.
5.	Attachment B	Attachment B	Are the Non-Key positions (Quality Assurance Consultant and Geographic Information System Specialist) required positions? May firms propose additional personnel beyond the five positions listed in Attachment B? <b>Answer:</b> Firms may not propose additional personnel beyond the five positions listed in attachment B, and the Quality Assurance Consultant & Geographic Information System Specialist are not required initial positions. They should be available upon written request.

**31. QUESTION**

What is the deadline for questions?

**Answer:** All TO questions are due May 22, 2020 at 10:00 am eastern time



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TO Proposal due (closing) June 1, 2020 at 10:00 am eastern time (see page ii)

### 32. QUESTION

Understanding that this solicitation calls out for services around a new tax processing system, I am interested in learning if there will be any supplemental hardware necessary to support the back end of the new tax system?

**Answer:** No comment

### 33. QUESTION

Will the Comptroller of Maryland consider the experience of our subcontractors and the personnel in our team instead of the required Offeror Experience?

**Answer:** No.

### 34. QUESTION

We would like to know if we are eligible to respond or there are any prerequisites.

**Answer:** The only Master Contractors eligible to bid on this solicitation are those listed on DoIT Functional Area 10 – IT Management Consulting Services.



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**End of Amendment #1**

**Date Issued: May 15, 2020**

**By: Bernice Jeffries, Procurement Officer**



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AMENDMENT #2  
CONSULTING AND TECHNICAL SERVICES (CATS+)  
TASK ORDER REQUEST FOR PROPOSALS (TORFP)  
IT MANAGEMENT CONSULTING SERVICES FOR BUSINESS INTELLIGENCE/DATA  
WAREHOUSE  
E00B0600036

BUREAU OF REVENUE (BRE)  
MAY 20, 2020

Ladies and Gentlemen:

This Amendment is issued to Extend the TO Proposal Due (Closing) Date and Time and form D-1A is being issued to 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 TO Proposal Due (Closing) for submission has been extended from Monday, June 1, 2020 at 10 AM Local Time (Eastern Time) to Monday, June 8, 2020 at 10 AM Local Time (Eastern Time).***
- ***Form D-1A MBE UTILIZATION AND FAIR SOLICITATION AFFIDAVIT & MBE PARTICIPATION SCHEDULE Number 1 has been corrected to:***

**From:**

I acknowledge and intend to meet the overall certified Minority Business Enterprise (MBE) participation **goal of 10 percent** and, if specified in the solicitation, the following subgoals (complete for only those subgoals that apply):

**To read:**

I acknowledge and intend to meet the overall certified Minority Business Enterprise (MBE) participation **goal of 30 percent** and, if specified in the solicitation, the following subgoals (complete for only those subgoals that apply):

***See attach revised form.***



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**End of Amendment #2**

**Date Issued: May 20, 2020**

**By: Bernice Jeffries, Procurement Officer**



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AMENDMENT #3 Issued: May 22, 2020

CONSULTING AND TECHNICAL SERVICES+ (CATS+)  
TASK ORDER REQUEST FOR PROPOSALS (TORFP) E00B0600036  
IT MANAGEMENT CONSULTING SERVICES FOR BUSINESS INTELLIGENCE/DATA  
WAREHOUSE E00B0600036 BUREAU OF REVENUE (BRE)

Ladies/Gentlemen:

This Amendment #3 is being issued to amend and clarify certain information contained in the above referenced TORFP. The amendment contains questions and answers and revised Section 5.4.2. All information contained herein is binding on all Offerors who respond to this TORFP. Specific parts of the TORFP have been amended.

**35. QUESTION**

- **Section 2.3** of the TORFP mentions the “Data Warehouse/Business Intelligence (DW/BI) project successfully went live in October 2012”. The following are the questions related to this:
  - What are the names of the contractor and sub-contractors that were part of this DW/BI project?  
**Answer:** Teradata Government Systems, LLC; Miamisburg, OH,  
MBE Subcontractor: The Sartell Group, Inc.
  - What was/is the value of the contract?  
**Answer:** \$23,935,785
  - Are those contractors eligible to bid on this solicitation?  
**Answer:** Yes
- **Section 2.3** of the TORFP also mentions that “COM is in the process of implementing a new integrated tax processing system that is server based”. The following are the questions related to this:
  - What are the names of the contractor and sub-contractors that were part of this new integrated tax processing system project?  
**Answer:** Revenue Solutions, Inc. Pembroke, MA 02359
  - What was/is the value of the contract?



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- 
- **Answer:** \$159,665,190

MBE Subcontractor:

**Answer:** The Sartell Group, Inc.

Are those contractors eligible to bid on this solicitation?

**Answer:** Yes

**Section 2.3.2** of the TORFP mentions that COM “will provide normal office working facilities and equipment reasonably necessary ...”.

## QUESTION(s)

The following are the questions related to this:

Considering the COVID-19 situation, is remote work going to be allowed?

**Answer:** To be Determined a time of award

If yes, even after the COVID-19 situation is resolved and assuming that people will be allowed to work from offices, can remote work continue for this project with onsite meetings as necessary?

**Answer:** To be Determined a time of award

Is there currently any resource performing similar functions as what is being sought in the “Analyst, Computer Software/Integration (Senior)” resource? In other words, is there an incumbent contractor resource with this role?

**Answer:** Yes, there is an incumbent resource in this role.

Is there currently any resource performing similar functions as what is being sought in the “Risk Assessment Consultant (Senior)” resource? In other words, is there an incumbent contractor resource with this role?

**Answer:** Yes, there is an incumbent resource in this role.

- Is there currently any resource performing similar functions as what is being sought in the “Group Facilitator (Senior)” resource? In other words, is there an incumbent contractor resource with this role?

**Answer:** Yes, there is an incumbent resource in this role.



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- **Section 3.10. A. 6)** of the TORFP states that “All computer systems processing, storing, or transmitting Federal or State tax information must meet the requirements defined in IRS Publication 1075. To meet functional and assurance requirements, the security features of the environment must provide for the managerial, operational, and technical controls. All security features must be available and activated to protect against unauthorized use of and access to Federal or State tax information.”

**Question:** The following are the questions related to this:

- Assuming remote work is allowed will the resources be provided with laptops that meet those requirements?

**Answer: COM laptops that will include secure VPN access, will be provided to all resources that will require a device.**

- If the Contractor is required to provide the laptops, will COM provide those software and tools in order to comply with the requirements?

**Answer: Yes**

✓ If not, can COM specify the software and tools that will need to be installed?

- Will it be a requirement to only use VPN or other secure access in case of remote work?

**Answer: see above answer**

- **Section 3.12.3** talks about the “Offeror Experience” with requirements for the Offeror to have experience in federal and state taxes. Considering that this is a Time and Materials (T&M) contract we believe that the “Personnel Experience” requirement is important. As such, we request COM to remove the “Offeror Experience” section entirely or change it to the Offeror demonstrating *generic* experience in providing IT Management Consulting Services for Business Intelligence/Data Warehouse.

**Question:** Will COM grant this request?

**Answer:** The “Offeror Experience” cannot be removed or changed as the knowledge of Federal and State taxes plays a pivotal role in the implementation of COM’s new integrated tax system and Data Warehouse.

- **Section 3.9 “Number of Personnel to Propose”** of the TORFP mentions “how additional resources shall be acquired to meet the needs of the COM”. **Attachment B** (the separate Excel TO Financial Proposal Form labeled, “**Comptroller of MD Business Intelligence - Data Warehouse Pricing Sheet**”) lists the three (3) key personnel labor categories for Year 1 thru Year 5 and the following *additional* labor categories for Year 2 thru Year 5: “Quality Assurance Consultant (Senior)(Non Key)”; “Geographic Information Systems Specialist (Non Key)”.

**Question:** The following are the questions related to this:

- Our understanding is that COM might require (through the Work Order process) **only** two additional resources for Year 2 thru Year 5 – i.e., “Quality Assurance Consultant (Senior)” and “**Geographic Information Systems Specialist**”. Is that understanding correct?

**Answer:** Yes, that is correct the resource positions listed are what we could require in years 2 thru 5.

- Also, we see in the Excel sheet that the hours for the additional resources – “Quality Assurance Consultant (Senior)” and “Geographic Information Systems Specialist” become 1000 hours individually (i.e., part-time) for Year 3 onwards. Is this correct?

**Answer:** Yes

**Question:** There are blank rows in each Year. Our understanding is that these blank rows **should not be** filled with any other labor category. In other words, we should leave them as is. Is that understanding correct?

**Answer:** Yes. The excel spreadsheet has been updated deleting the extra rows. Posted on Amendment 1 # 3

- **Section 4.5 “Oral Presentation”** of the TORFP talks about “oral presentation” by “phone or in person” interviews of proposed personnel. It also mentions “for each round of oral presentations ...”.

**Question:** The following are the questions related to this:

- Can COM clarify if it intends to have an oral presentation with all the proposed key resources present in the oral presentation (i.e., a “group” interview) *and* the Offeror’s representative being present  
*or*



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separate interviews for each of the proposed three (3) key personnel?

**Answer:** Yes, separate interviews.

How many “rounds” of Oral Presentation / Interview are anticipated?

**Answer:** one

What is the approximate timeframe for COM to have the Oral Presentation / Interviews of the proposed key personnel candidates?

**Answer:** 30 to 45 days from the TORFP closes.

- Due to the COVID-19 situation and to allow sufficient time to review the answers to questions that we and other contractors would have submitted, we request COM for an extension in the proposal due date by at least two weeks.

**Question:** Will COM grant this request?

**Answer:** The extension notice has been posted on May 20, 2020 Amendment 2.

### 36. QUESTION:

Since this is a staffing contract and focus is on the experience of the resources, can the govt consider removing the past performance requirements related to state taxes experience?

**Answer:** Section 3.12.3 Offeror experience (page 15)

### 37. QUESTION:

Could you please provide the TORFP number if via CATS contract or Solicitation number if it was via eMD or eMMA, through which the incumbent Math Tech’s current contract was awarded?

**Answer:** E00B060007

### 38. QUESTION:

For our MBE partner, we would like to know if it is possible for us to work with a company that we have worked with closely in the past. They applied for their MBE certification a few months ago, but the application has is still be processed. I understand that some applications have slowed down due to the COVID-19 situation.



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Is there a possibility that we could use them as our MBE partner in our proposal and if for some reason they do not have the MBE certification before the contract begins, we can substitute them for another MBE partner? Or possibly can you accept an MBE designation from another state? I know some states have reciprocity with other states with MBE certification. This company has been our MBE partner for New Jersey, Missouri, and Illinois.

**Answer:** The Prime may NOT use a firm with a pending MBE status to fulfill an MBE goal. They are free to use them for work that is not satisfying the MBE goal.

**39. QUESTION:**

Is there any incumbent for this RFP? If yes, please share the name?

**Answer:** Math Tech is the incumbent for the current TORFP.

**40. QUESTION:**

What is the budget for this project?

**Answer:** No comment

**41. QUESTION:**

If we are using MBE Sub, can we use there at least past performance for this project?  
I reached out to the supplier for clarification?

**Answer:** No.

**42. QUESTION:**

Can we submit the proposal, while we are pending approval for Function Area # 10?

**Answer:** The firm cannot submit a bid/proposal for function area #10 if they are not already approved.

**43. QUESTION:**

Is there any incumbent for this RFP? If yes, please share the name?

**Answer:** MathTech Inc



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**44. QUESTION:**

If we are MBE from Maryland so it is compulsory to find new subcontractor with 30% goal?

**Answer:** Master Contractors must be MBE certified in the State of MD. In addition, the Master Contractor cannot perform 100% of MBE goal. The maximum is 50%.

**45. QUESTION:**

If we are using MBE subcontractor, can we use their reference or past performance in this project/ can we use their experience as a reference).

**Answer:** No.

**46. QUESTION**

There seems to be two subsections missing under 5.4.2.A. The TORFP calls out only a one-page Executive Summary to detail the proposed solution.

5.4.2 The TO Technical Proposal shall include the following documents and information in the order specified as follows:

**A. Proposed Services:**

**1) Executive Summary:** A one-page summary describing the Offeror's understanding of the TORFP scope of work (**Sections 2-3**) and proposed solution.

Prior TORFPs from Comptroller and other State agencies have the following under 5.4.2.A

A. Proposed Services:

**2) Proposed Solution:** A more detailed description of the Offeror understanding of the TORFP scope of work, proposed methodology and solution. The proposed solution shall be organized to match the requirements outlined in Sections 2-3.

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

As it stands now, there is no section with a "call-out" to provide a detailed response to items/requirements in Sections 2 and 3 (Proposed Solution).



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**Answer: See revised Section 5.4.2**

#### **47. Question**

In the TORFP Section 5.4.2-part C (Minimum Qualifications Documentation) mentioned that the Offeror shall submit any Minimum Qualifications documentation that may be required, as outlined in TORFP Section 1. please clarify, do we have to submit minimum Qualification documents for the key resources with our response? If so, please specify which type of documents we need to submit?

**Answer:** See Section 1 Minimum Qualification (page 1) and click each link which will direct you to DoIT website

**End of Amendment #3**

**Date Issued: May 22, 2020**

**By: Bernice Jeffries, Procurement Officer**



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## 5.4 Volume I - TO Technical Proposal

NOTE: Provide **no pricing information** in the TO Technical Proposal (Volume I). Include pricing information only in the TO Financial Proposal (Volume II).

- 5.4.1 In addition to the instructions below, responses in the Offeror's TO Technical Proposal shall reference the organization and numbering of Sections in the TORFP (e.g., "Section 2.2.1 Response . . . ; "Section 2.2.2 Response . . ."). All pages of both TO Proposal volumes shall be consecutively numbered from beginning (Page 1) to end (Page "x").
- 5.4.2 The TO Technical Proposal shall include the following documents and information in the order specified as follows:
- A. Proposed Services:
- 1) Executive Summary: A one-page summary describing the Offeror's understanding of the TORFP scope of work (**Sections 2-3**) and proposed solution.
  - 2) Proposed Solution: A more detailed description of the Offeror understanding of the TORFP scope of work, proposed methodology and solution. The proposed solution shall be organized to match the requirements outlined in Sections 2-3.
  - 3) Assumptions: A description of any assumptions formed by the Offeror in developing the TO Technical Proposal.
- B. Proposer Information Sheet and Transmittal Letter
- The Offeror Information Sheet (see **Appendix 2**) and a Transmittal Letter shall accompany the TO Technical Proposal. The purpose of the Transmittal Letter is to transmit the TO Proposal and acknowledge the receipt of any addenda to this TORFP issued before the TO Proposal due date and time. Transmittal Letter should be brief, be signed by an individual who is authorized to commit the Offeror to its TO Proposal and the requirements as stated in this TORFP, and contain acknowledgement of all addenda to this TORFP issued before the TO Proposal due date.
- C. Minimum Qualifications Documentation (If applicable)
- The Offeror shall submit any Minimum Qualifications documentation that may be required, as set forth in TORFP **Section 1**.
- D. Proposed Personnel and TORFP Staffing
- Offeror shall propose exactly three Key Personnel in response to this TORFP. Offeror shall:
- 1) Identify the qualifications and types of staff proposed to be utilized under the Task Order. The Offeror shall describe in detail how the proposed staff's experience and qualifications relate to their specific responsibilities.
  - 2) Complete and provide for each proposed resource, an **Appendix 4: Personnel Resume Form**.
  - 3) Provide a Staffing Management Plan that demonstrates how the Offeror will provide resources in addition to the personnel requested in this TORFP, and how the TO Contractor Personnel shall be managed. Include:
    - a) Planned team composition by role (**Important! Identify specific names and provide history only for the proposed resources required for evaluation of this TORFP**).

- 4) 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.

E. Overall Offeror team organizational chart

Provide an overall team organizational chart with all team resources available to fulfill the Task Order scope of work.

F. Master Contractor and Subcontractor Experience and Capabilities

- 1) Provide up to three examples of engagements or contracts the Master Contractor or Subcontractor, if applicable, has completed that were similar to the requested scope of work. Include contact information for each 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 experience)
  - c) Services provided as they relate to the 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.
- 2) 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 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 A 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) Start and end dates for each engagement or contract. If the Master Contractor is no longer providing the services, explain why not.
- e) Dollar value of the contract.
- f) Indicate if the contract was terminated before the original expiration date.
- g) Indicate if any renewal options were not exercised.

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

G. State Assistance

Provide an estimate of expectation concerning participation by State personnel.

H. 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.

Offeror shall furnish a list that identifies each section of the TO Technical Proposal where, in the Offeror's opinion, the Offeror's response should not be disclosed by the State under the Public Information Act.

**5.5 Volume II – TO Financial Proposal**

- 5.5.1 The TO Financial Proposal shall contain all price information in the format specified in **Attachment B** - Financial Proposal Form. The Offeror shall complete the Financial Proposal Form only as provided in the Financial Proposal Form Instructions and the Financial Proposal Form itself.
- 5.5.2 The TO Financial Proposal shall contain 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 Financial Proposal Form);
- 5.5.3 **Attachment B**– Financial Proposal Form, with all proposed labor categories including all rates fully loaded. Master Contractors shall list all key resources by approved CATS+ labor categories in the TO Financial Proposal.
- 5.5.4 To be responsive to this TORFP, the Financial Proposal Form 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.
- 5.5.5 Prices shall be valid for 120 days.

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