

Larry Hogan
Governor

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Secretary

MARYLAND DEPARTMENT OF GENERAL SERVICES
OFFICE OF THE SECRETARY

Amendment #1

Consulting and Technical Services+ (CATS+)
Task Order Request for Proposals (TORFP)
#F50B0600060
Independent Verification and Validation

August ##, 2020

Ladies/Gentlemen:

This Amendment 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. Appendix 4 – Past Performance Rating Form was erroneously omitted from TORFP #F50B0600060 and is attached to and added to the TORFP through this Amendment #1.

Issued by:
Dapheny McCray
Procurement Officer





MARYLAND DEPARTMENT OF GENERAL SERVICES
OFFICE OF THE SECRETARY

Amendment #2

Consulting and Technical Services+ (CATS+)
Task Order Request for Proposals (TORFP)
#F50B0600060
Independent Verification and Validation

September 1, 2020

Ladies/Gentlemen:

This Amendment 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. The due date for TO Proposals is amended as follows:

Questions Due Date and Time:	September 2, 2020 <u>September 9</u> , 2020 at 09:30 am
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2. The due date for TO Proposals is amended as follows:

Closing Date and Time:	September 15, 2020 <u>September 30</u> , 2020 at 09:30 am Location Time Offerors are reminded that a completed Feedback Form is requested if a no-bid decision is made (see Section 5).
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Issued by:
Dapheny McCray
Procurement Officer





MARYLAND DEPARTMENT OF GENERAL SERVICES
OFFICE OF THE SECRETARY

Amendment #3

Consulting and Technical Services+ (CATS+)
Task Order Request for Proposals (TORFP)
#F50B0600060
Independent Verification and Validation

September 17, 2020

Ladies/Gentlemen:

This Amendment 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. Amend the Key Information Summary Sheet as follows:

Closing Date and Time:	September 30, 2020 <u>October 7, 2020</u> at 09:30 am Location Time Offerors are reminded that a completed Feedback Form is requested if a no-bid decision is made (see Section 5).
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Task Order Duration:	Three year base period with 2, one year option periods <u>The Task Order shall end 4/21/2028 coterminous with the CATS+ Master Contract</u>
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2. Amend TORFP Section 2.2 Purpose/Background as follows:

The purpose of this TORFP is to provide a streamlined procurement process to create a “pool” of qualified Master Contractors that may be engaged through work orders to provide Independent Verification and Validation (IV&V) services. DoIT intends to award this TORFP to up to ten (10) Master Contractors. After award of the TORFP, the State will conduct a secondary level of competition through a Work Order process to procure resources for specific IV&V services as outlined in Section ~~3.10~~ **3.11 Work Order Process**.

3. Remove TORFP Section 3.7.4 TO Contractor Personnel Maintain Certifications:



~~3.0.4~~ — ~~TO Contractor Personnel Maintain Certifications~~

~~Any TO Contractor Personnel provided under this TORFP must maintain in good standing any required professional certifications for the duration of the TO Agreement.~~

4. TORFP Section 3.7.5 Work Hours has been amended to 3.7.4 Work Hours
5. Amend TORFP Section 4.12.1 as follows:

4.2.1 Non-Disclosure Agreement (~~Offeror~~ TO Contractor)

All Offerors are advised that this solicitation and any TO Agreement(s) are subject to the terms of the Non-Disclosure Agreement (NDA) contained in this solicitation as **Attachment I**. This Agreement must be provided within five (5) Business Days of notification of recommended award. ~~; however, to expedite processing, it is suggested that this document be completed and submitted with the TO Proposal.~~

6. Amend TORFP Section 5.4.2.H.a.1 as follows:
 1. All forms required for the TO Technical Proposal are identified in Section 7 – Attachments and Appendices. Unless directed otherwise by instructions within an individual form, complete, sign, and include all required forms in the TO Technical Proposal. **In addition, as required in TORFP Section 3.5, Offerors must confirm that, as of the date of its proposal, the insurance policies incorporated into its Master Contract are still current and effective at the required levels (See Master Contract Attachment M).**

7. Amend page 35, Attachment B. Financial Proposal as follows:

See separate Excel TO Financial Proposal Form labeled CATS+ TORFP #F50B060060 – IV&V Services – TO Financial Proposal - Attachment B.xls

The total class hours are not to be construed as “guaranteed” hours; the total number of hours is an estimate only for purposes of price sheet evaluation.

A year for this Task Order shall be calculated as one calendar year (12 months) from the Effective Date.

Labor Rate Maximums: The maximum labor rate that may be proposed for any CATS+ Labor Category shall not exceed the maximum for the CATS+ Master Contract year in effect on the TO Proposal due date. ~~Please indicate which of the staff are guaranteed work and indicate the rest are appropriate for non-guaranteed work via Task Orders.~~

8. Attachment B – Price Proposal – CATS+ TORFP #F50B0600060 – Independent Verification and Validation (IV&V) has been replaced in its entirety, and is attached to and incorporated into CATS+ TORFP#F50B0600060 through Amendment #3.
9. Amend TORFP Section 7 – TORFP Attachments and Appendices table as follows:

10 Business Days after recommended award <u>of a Work Order</u>	D	MBE Forms D-1B, D-1C,D-2, D-3A, D-3B (see link at http://procurement.maryland.gov/wp-content/uploads/sites/12/2018/05/AttachmentDMBE-Forms-1.pdf) Important: Attachment D-1C, if a waiver has been requested, is also required within 10 days of recommended award.
5 Business Days after recommended award— However, suggested with Proposal	I	Non-Disclosure Agreement (Contractor) (see link at http://procurement.maryland.gov/wp-content/uploads/sites/12/2018/04/Attachment-I-Non-DisclosureAgreementContractor.pdf)
Before Proposal, as directed. <u>N/A</u>	3	Non-Disclosure Agreement (Offeror) (see link at http://procurement.maryland.gov/wp-content/uploads/sites/12/2018/05/Appendix-3-Non-Disclosure-Agreement-Offeror-1.dotx)
5 Business Days after recommended award		Evidence of meeting insurance requirements (see Section 3-6 <u>3.5</u>); 1 copy

10. **Amend Attachment M – Task Order, Section 3. Time for Performance as follows:**

3. Time for Performance

Unless terminated earlier as provided in the Master Contract, the term of this TO Agreement shall commence as of the “Effective Date” and expire on **April 21, 2028**. ~~the third anniversary thereof.~~
At the sole option of the State, this TO Agreement may be extended for two one year periods for a total TO Agreement period of five years.

11. Amend page 59, Appendix 3. Non-Disclosure Agreement (Offeror) as follows:

This solicitation does not require a Non-Disclosure Agreement (Offeror)

Issued by:
Dapheny McCray
Procurement Officer

**TORFP (TASK ORDER REQUEST FOR PROPOSALS)
FOR
CATS+ TORFP #F50B06000060 - Independent Verification and Validation (IV&V)**

QUESTIONS AND RESPONSES #1

Question 1: May the agency consider extending the period of past performance to 10 years?

Answer: No.

Question 2: Do we need to submit a Non-Disclosure Agreement with the Proposal? If so, can you please tell us which one? There seems to be two (2) Non-Disclosure Agreement - Attachment I and Appendix 3.

Answer: Please see Amendment #3 to the TORFP.

Question 3: Section 5.4.2 A. Proposed Services – Formatting: Is 1.15” spacing acceptable for the response to this section?

Answer: Yes

Question 4: Section 5.4.2 A. Proposed Services – Formatting: May we use different fonts and font sizes in figures and graphics? May we use different font sizes in tables?

Answer: Yes

Question 5: Section 5.4.2 A. Proposed Services (b.) “A detailed discussion...”: In our response to this portion of the proposed services, is DoIT looking for a point-by-point response to the examples of services listed in section 2.3.1, starting on page 8? Could you please provide more information for this section and confirm that it is limited to 30 pages?

Answer: **As indicated in Section 5.4.2 A. b. ‘A detailed discussion of the Offeror’s understanding of the work entailed to address the requirements outlined in the TORFP and how the Offeror proposes to satisfy the requirements...(limited to 30 pages)**

Question 6: Section 5.4.2 E. Experience and Qualifications: May we use references who were involved in any of the five past performance examples?

Answer: **Yes.**

Question 7: Section 5.4.2 A. Proposed Services –c. Sample Risk Assessment: Should this be an actual example from our work with a client, or a template that we might use for work with Maryland?

Answer: **The risk assessment provided with the technical proposal is of the offeror’s choosing in order to meet the requirements in the TORFP.**

Question 8: Section 5.4.2 A. Proposed Services –d. Sample Project Management Plan: Should this be an actual example from our work with a client, or a template that we might use for work with Maryland?

Answer: **The Sample Project Management Plan provided with the technical proposal is of the offeror’s choosing in order to meet the requirements in the TORFP.**

Question 9: Section 5.4.2 C. Staffing Management Plan, (3): Please clarify this requirement. Is this asking us to describe the role of each management staff member?

Answer: **Included in 3. of section 5.4.2 C. ‘Biographical data and an organization chart detailing the names and titles of the Offeror’s management staff who will supervise the personnel**

and a description of the services rendered under the TO Agreement.'

Question 10: Section 5.4.2 A. Proposed Services –f. Tools: Please define what is meant by tools. Are these software tools or documentation tools that we would use in an assessment?

Answer: Tools may be defined by the offeror for use to meet any requirements in Sections 2 through 3 as indicated in Section 5.4.2 A. f.

Question 11: The TORFP (Section 5.4.2) asks for a sample Risk Assessment and a sample Project Plan. Would it be acceptable for us to submit a redacted version of each because of our non-disclosure agreement with our customers?

Answer: Yes.

Question 12: Section 5.4.2.b states, "b.A detailed discussion of the Offeror's understanding of the work entailed to address the requirements outlined in the TORFP and how the Offeror proposes to satisfy the requirements. This section should include a detailed description of the Offeror's proposed IV&V methodology(ies) and services as required by the TORFP. (limited to 30 pages, 8.5" x11", 1" border, Times New Roman 12 point font)."

Can you please confirm that within the 30-page limit we are to address all the requirements from Sections 2 and 3?

Answer: Section 5.4.2 A. notes a page limit for each subsection (a-f) that is in addition to the other subsections. Subsection b. is limited to 30 pages which is in addition to the other subsections.

Question 13: Attachment I. Non-Disclosure Agreement (Contractor) and Appendix 3. Non-Disclosure Agreement (Offeror) appear to be essentially the same document. Section 7 TORFP ATTACHMENTS AND APPENDICES states that Attachment I is recommended to be

submitted with our proposal and Appendix 3 is required before proposal submittal.

As Appendix 3 is more appropriate at the proposal level, would you please confirm that Attachment I is not recommended for submittal with the proposal?

Answer: See response to Question #2, and Amendment #3 to the TORFP.

Question 14: The TORFP (Section 5.4.2) asks for a sample Risk Assessment and a sample Project Plan. Would it be acceptable for us to submit a redacted version of each because of our non-disclosure agreement with our customers?

Answer: See response to Question #11.

Question 15: Should we provide both solutions and resources as a response to this TORFP?

Answer: Offerors are to provide what is requested in TORFP Section 5.4.2, resumes for resources are not required in response to the TORFP.

Question 16: On page 9 of the TORFP, Section 2.3.2 Required resources may include, they have provided 5 Roles and the same is given in Financial Proposal as well. Should we attach Resumes for these roles?

Answer: See response to Question #15.

Question 17: TORFP has not given any 4A Labor summary Personnel Resume form?

Answer: The 4A Labor Summary Personnel Resume form is not a requirement of the TORFP.

Question 18: In Page 35 Attachment B Financial Proposal, See separate Excel TO Financial Proposal Form labeled CATS+ TORFP #F50B0600060 – IV&V Services – TO Financial Proposal - Attachment B.xls
Labor Rate Maximums: The maximum labor rate that may be proposed for any CATS+ Labor Category shall not exceed the maximum for the CATS+ Master Contract year in effect on the TO Proposal due date. Please indicate which of the staff are guaranteed work and indicate the rest are appropriate for non-guaranteed work via Task Orders.

Answer: **There is no work guaranteed under the TORFP. See response to Question #19.**

Question 19: Could you please explain the meaning of the statement "Please indicate which of the staff are guaranteed work and indicate the rest are appropriate for non- guaranteed work via Task Orders?"

Answer: **The statement has been deleted, please see Amendment #3 to the TORFP.**

Question 20: What do you mean by guaranteed work and non- guaranteed work?

Answer: **Please refer to the response to Question #19.**

Question 21: Where should we indicate the staffs are guaranteed work and the rest are appropriate for non- guaranteed work?

Answer: **Please refer to the response to Question #19.**

Question 22: In Attachment B, CATS+ Labor Category is not provided for the given role. Do we map it from the 2.10 Labor Categories and Qualifications?

Answer: **Master Contractors are to propose the CATS+ Labor Category as listed in Section 2.10 of the CATS+ RFP that they wish to propose for the given role.**

Question 23: On page 9 of the TORFP, Section 2.3.2 Required resources may include, they have provided only a few Duties/Responsibilities (including but not limited to) for each of the five roles. Where can we find the rest of the Duties/ Responsibilities for each of them?

Answer: **Expected duties/responsibilities for each of the roles will be provided at the Work Order level.**

Question 24: In page 7 of the TORFP, it says that DoIT intends to award this TORFP to up to ten (10) Master Contractors. After award of the TORFP, the State will conduct a secondary level of competition

through a Work Order process to procure resources for specific IV&V services as outlined in Section 3.10.

Answer: **The section reference should read 3.11, please see Amendment #3 to the TORFP.**

Question 25: In this TORFP, section 3.10 on page 19 is Veteran Small Business Enterprise (VSBE) Reports? Which one is the actual section?

Answer: **See response to Question #24.**

Question 26: Should we prepare the Offeror's understanding of the scope, how the Offeror proposes to satisfy the requirements and Offeror's proposed IV&V methodology(ies) and services as mentioned in section 5.4.2.A.b based on section 2.3- IV&V Requirements in Page 8 of the TORFP?

Answer: **The offeror should consider the entirety of the TORFP when detailing responses.**

Question 27: While preparing the proposal, do we follow the page limit restriction only for the is specified sections in the TORFP? Do you have any page limit restrictions for the rest of the sections?

Answer: **There is no page restriction unless specified.**

Question 28: Do you have any page limit restriction for the entire proposal?

Answer: **See response to Question #27.**

Question 29: In-Page 27, 5.4.2.E(a) - Master Contractor and Subcontractor Experience and Qualifications (reference Section 3.7.2) The Master Contractor shall provide three references and five past performances (submit Appendix 4 for past performances) for contracts completed within the last five years (no more than one may come from a Subcontractor), that were similar to the requested scope of work. Include contact information for each client organization complete with the following:

Question 29a: Do we provide both references and Past Performances in this section?

Answer: Provide the three references in response to TORFP Section 5.4.2.E(a), and provide the past performances on Appendix 4.

Question 29b: Is it up to 5 past performances we can provide or mandatory that we have to provide exactly 5 past performances?

Answer: Provide what is required in TORFP Section 5.4.2.E(a).

Question 29c: Can we provide more than 5 past performances?

Answer: Provide what is required in TORFP Section 5.4.2.E(a).

Question 29d: Out of the five past performances we provide, is it mandatory that only one past performance can be of the subcontractor?

Answer: No more than one may come from a Subcontractor.

Question 29e: Should we submit an Appendix 4 – PAST PERFORMANCE RATING FORM. For all Past Performances, we are giving?

Answer: Submit Appendix 4 for the five past performances.

Question 29f: Is it up to 3 references we can provide or mandatory that we have to provide exactly 3 references?

Answer: Offerors must provide three references as required in TORFP Section 5.4.2.E(a).

Question 29g: Out of the three references we provide, is it mandatory that only one reference can be of the subcontractor?

Answer: Yes.

Question 29h: Can we provide more than 3 references?

Answer: See response to Question 29f.

Question 29i: Since it is mentioned that no more than one may come from a Subcontractor), can we provide one past performance of a subcontractor and a reference of a different subcontractor?

Answer: **No. No more than one reference or past performance may come from a Subcontractor.**

Question 29j: Is it mandatory that all the references we provide in section 5.4.2.E should match the past performances we provide in the capability section?

Answer: **The references and past performances do not have to match. Past Performances are to be submitted on Appendix #4 as required under TORFP Section 5.4.2.E.**

Question 30: Section 5.4.2.A.b- A detailed discussion of the Offeror's understanding of the work entailed to address the requirements outlined in the TORFP and how the Offeror proposes to satisfy the requirements. This section should include a detailed description of the Offeror's proposed IV&V methodology(ies) and services as required by the TORFP. (limited to 30 pages, 8.5" x11", 1" border, Times New Roman 12 point font).

Question 30a: Is this the section where the Offeror's capabilities of providing the required services in the TORFP Scope of Work based on 2.3-IV&V Requirements to be detailed?

Answer: **Refer to the response to Question #26.**

Question 30b: Do we provide the past performances mentioned in section 5.4.2.E(a) in this section under the offeror's understanding?

Answer: **Yes.**

Question 31: In section 5.4.2. A(d) Project Management Plan (PMP) as a Microsoft Word document submitted via an embedded attachment. The Sample IV&V Project Management Plan shall describe the Offeror's general approach to performing IV&V.

Could you please elaborate on what has to be exactly done for the embedded attachment?

Answer: **The sample PMP shall be displayed as an image in the body of the offeror's technical proposal.**

Question 32: Is there a maximum limit for the number of subcontractors we partner with?

Answer: No.

Question 33: Is there a maximum limit for the number of MBE subcontractors we partner with?

Answer: No.

Question 34: 5.4.2.F State Assistance- What exactly should we provide here?

Answer: The requested estimate of expectation concerning participation by State personnel is of the offeror's choosing in order to meet the requirements in the TORFP.

Question 35: 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)

In the Attachment B instructions sections, it is also mentioned that . Except as instructed on the Financial Proposal Form, nothing shall be entered on or attached to the Financial Proposal Form that alters or proposes conditions or contingencies on the prices. Alterations and/or conditions may render the Proposal not reasonably susceptible of being selected for award."

Question 35a: Is it mandatory that the offeror should provide any assumptions?

Answer: No.

Question 36: We understand we are not supposed to submit resumes as part of our proposal but do you want to see any proof of the potential candidates we may have for the work orders as an attachment? (For example, resume, summary, copy of diplomas, references, signed documents, etc.)

Answer: No, resumes will be required in response to a Work Order.

Question 37: We understand that in making the final selection, technical merit has greater weight than financial. Can the State clarify how will they be making the final selection of vendors? What percentage of the evaluation will be Technical and what percentage will be Financial?

Answer: Please refer to TORFP Section 6.4, Selection Procedures.

Question 38: Section 2.3.1.J, page 8: The TORFP states that the IV&V Contractor may be asked to “perform Certification and Accreditation (C&A) assessments.” Typically, the State Agency’s Security Official is required to perform this process and provide signoff to authenticate the results. Please clarify if the State is expecting the IV&V contractor to perform the C&A process or to assess the State’s C&A process.

Answer: The State may request that the IV&V contractor to perform the C&A assessment.

Question 39: Section 2.3.1.O, page 9: Please clarify the requirement for the IV&V contractor to perform “feasibility and other assessments (technical, schedule, operational, economic, and organizational maturity.” Would these be within the realm of IV&V assessments to determine if processes for the listed assessments are being performed in compliance with State guidelines and TORFP requirements.

Answer: See TORFP Section 2.3.1.

Question 40: Section 2.3.1.O, page 9: Please clarify the requirement for the IV&V contractor to perform “feasibility and other assessments (technical, schedule, operational, economic, and organizational maturity.” Is the State asking the IV&V Contractor to perform a feasibility assessment? If so, to what does the feasibility pertain.

Answer: See Response to Question 39.

Question 41: Section 2.3.1.N, page 9: Please clarify expectations for the IV&V Contractor to perform individual contract assessments. Which contracts does this refer to?

Answer: See Response to Question 39.

Question 42: Section 3.5, page 13: Where in the proposal should bidders provide the statement confirming their insurance policies are still current?

Answer: Please refer to Amendment #3 to the TORFP.

Question 43: Section 3.7.2.A, page 17: Please clarify whether the threshold amount of \$25,000,000 refers to the entire modernization initiative rather than the IV&V contract.

Answer: The IT projects should have budgets of \$25,000,000+.

Question 44: Section 5.4.2, page 26: Please confirm that graphics may be provided in different fonts and sizes (as opposed to TNR 12).

Answer: Confirmed.

Question 45: Section 5.4.2.E, page 27: The State is requesting 3 “references” and 5 “past performances.” We understand that the past performances must be completed by the client but how does this differ from the 3 references? Can the references provided be 3 of the 5 past performances

Answer: Yes.

Question 46: Section 5.4.2.E, page 27: The RFP states that the contracts must be completed within the last 5 years but Section 5.4.2.E.a.6 (page 28) asks if bidders are still providing the services to the client and, if not, explain why. This implies that the contracts do not have to be completed at the time of submission. Please clarify.

Answer: Contracts do not have to be completed at the time of proposal submission.

Question 47: Section 7, page 33: In the table, the Non-Disclosure Agreement (Offeror) is required “Before Proposal, as directed.” There are no other directions as to when the form should be submitted. Please clarify

Answer: **This requirement has been removed from the TORFP, please see Amendment #3 to the TORFP.**

Question 48: Attachment I, page 47: Section I-2 of the attachment requires bidders to list the employees/agents who will be given access to confidential information. Staffing will be established based on the requirements of the individual IV&V scopes of work, therefore, we do not have anyone to include on this list at this time. Is it acceptable to respond TBD at this time? If not, please advise.

Answer: **See Amendment #3.**

Question 49: Appendix 3, page 59: Are both Attachment I and Appendix 3 required with the proposal?

Answer: **Please refer to Amendment #3 to the TORFP.**

Question 50: Appendix 3, page 59, 2nd paragraph: The form does not state what type of confidential information the State is supplying to offerors (the field simply says [typesofNonDisclosureInfoOfferor] and access to confidential information does not appear to be needed in order to respond to the TORFP. Please clarify.

Answer: **This requirement has been removed from the TORFP, please refer to Amendment #3 to the TORFP.**

Question 51: A similar contract was released (F50B0600006) for IV&V? It looks like this contract has not be rewarded. Is there any intention to use these proposals for future work if awarded?

Answer: **No.**

Question 52: Under the evaluation criteria, it states "Seasoned, demonstrable, extensive experience in large-scale IT projects, with budgets of \$25,000,000+, in a number of federal, State or local agencies." Are you looking specifically for IV&V solutions with budgets over \$25M or are you asking if we can demonstrate all types of work over \$25M?

Answer: **See Response to Question #43.**

Question 53: 2.3 IV&V Requirements 2.3.1 Work Order J. Perform Certification and Accreditation assessments. Can you elaborate on any specific certification and accreditation assessments required?

Answer: See TORFP Section 2.3.1.

Question 54: The Master Contractor shall provide three references and five past performances (submit Appendix 4 for past performances) for contracts completed within the last five years (no more than one may come from a Subcontractor) Does this mean that you need a total of 8 or can 3 of the references also be past performances?

Answer: Three of the references can also be past performances.

Question 55: Could the state please confirm that identification of MBE subcontractors is not required in this response?

Answer: The identification of MBE partners will be at the Work Order level and not in response to the TORFP. Please refer to TORFP Section 4.7, MBE Participation Goal.

Question 56: How does the State plan to manage and integrate up to 10 Master Contractors who are all providing IV&V services across the various Work Orders/applications/projects/components?

Answer: Work Orders will be released and managed individually by the Department of Information Technology.

Question 57: Will this oversight and system integration be done by other contractors beyond the 10 awardees?

Answer: No.

Question 58: Will these contractors be conflicted out of bidding on these TORFP and Work Order requirements?

Answer: Only Master Contractors awarded a Task Order will be able to propose to Work Order.

Question 59: IV&V Requirements - A - Will access be granted to the incoming contractor to all the artifacts, stakeholders to conduct the independent research and provide the assessment depending on the Work Order?

Answer: Requirements and access will be established at the Work Order level.

Question 60: IV&V Requirements - B - Is there an approximate duration on how soon Phase One deliverables are expected to be delivered by Work Order?

Answer: See TORFP Section 2.3.1.

Question 61: IV&V Requirements - C - To better understand the Scope of work (Data migration or Complete rebuild of the application or only portions being migrated), would it be possible for DoIT to share more information on the legacy systems targeted for replacement?

Answer: See TORFP Section 2.3.1.

Question 62: IV&V Requirements - D - Agency compliance - Could you please elaborate more on this?

Answer: See TORFP Section 2.3.1.

Question 63: IV&V Requirements - F - For on-site assessments, could you please provide the suggested format and frequency of this artifact on a Work Order? Is there a requirement for resource(s) to be present on-site to conduct the assessments?

Answer: See TORFP Section 2.3.1.

Question 64: IV&V Requirements - H - Quality Assurance Audits - Is there an expectation to use any specific "to be built" tools or processes for conducting these audits?

Answer: See TORFP Section 2.3.1.

Question 65: IV&V Requirements - J - Could you please provide more information on the types of Certification and Accreditation assessments needed to support?

Answer: See TORFP Section 2.3.1.

Question 66: IV&V Requirements - K - Could you please provide us a specific risk score matrix that the contractor is expected to use for conducting this assessment?

Answer: The TO Contractor may choose the risk score matrix required to support the response.

Question 67: IV&V Requirements - What are the types of testing support required as part of this TORFP?

Answer: See TORFP Section 2.3.1.

Question 68: IV&V Requirements - Will there be Work Orders expected to support technical work (IV&V support) and System Integrator (oversight) as part of this engagement?

Answer: See TORFP Section 2.3.1.

Question 69: Are we expected to provide our response to each IV&V requirement (A to T) separately, or can we group them logically to provide our response?

Answer: It is up to the Master Contractor as to how they want to respond.

Question 70: Does the State expect offerors to propose candidates for any of these resources at the Task Order or Work Order level? Are any of these resources considered Key Personnel?

Answer: At the Work Order level, there are no Key Personnel required in response to the TORFP; however please refer to TORFP Section 3.7.1H.

Question 71: Professional Development - Are there any specific skill sets and/or professional certification requirements for each Labor Category?

Answer: Requirements will be established at the Work Order level.

Question 72: Does the State expect offerors to respond to the general compliance requirements in Sections 3.1 - 3.5 and 3.9 - 3.13 as part of our technical proposal, or can we simply confirm acceptance or any exceptions in our assumptions?

Answer: Confirm acceptance or provide any exceptions in the assumptions in the Technical Proposal.

Question 73: Where is the anticipated place of performance, i.e., a Government or contractor site?

Answer: That will be determined at the Work Order level.

Question 74: Will the State please consider extending the proposal due date by at least 3 weeks after providing responses to these Questions to allow Offerors sufficient time to revise their proposals?

Answer: Amendment #2 extends the Questions Due date and the Proposal Due date. See Amendment #2.

Question 75: Does the State anticipate any physical or virtual presentations? If so, how many and what type of personnel should we plan to attend?

Answer: That will be determined during the evaluation of proposals.

Question 76: Are there any current contractors or Task Orders that are known to have a Conflict of Interest with this Task Order?

Answer: No.

Question 77: Regarding the 30-page limit for the Proposed Services: Is the Contractor expected to respond to all of Sections 2-3? If so, can the State please increase the page limit to 50 pages?

Answer: Several subsections in Sections 2 and 3 simply require acceptance or compliance by the offeror. The Sections include, but may not be limited to 2.4, 2.5, 3.1, 3.2, 3.3, 3.4 and 3.5. The page limit will remain at 30.

Question 78: "The Offeror shall provide a sample IV&V Project Management Plan (PMP) as a Microsoft Word document submitted via an embedded attachment."

Can the State please allow the Sample Project Management Plan to be an Appendix within the document?

Answer: The embedded attachment is requested. There is no update to the TORFP.

Question 79: Can the State allow at least 2 pages for the Executive Summary?

Answer: No, the page limit will remain at one page.

Question 80: Can the State please increase the Staffing Management Plan to at least 10 pages to detail our approaches for each of the 4 bullets?

Answer: No, the page limit will remain at three pages.

Question 81: "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."

Can we include State of MD experience from subcontractors as well?

Answer: If the question is referring to 5.4.2.E.b, the requirement is for Master Contractors and not subcontractors.

Question 82: Could DoIT provide the list of any GFE/GOTS testing tools intended to be used by the contractor as part of the Work Order? Will DoIT provide the required licenses for the tools to be used on this engagement?

Answer: DoIT will not provide the requested list. It is up to the Master Contractor to provide the required licenses for the tools used when providing services under a Work Order.

Question 83: Since we are not proposing any Labor Categories for the Task Order, and will instead propose the selected Labor Categories for each Work Order-specific SOW from our full list of CATS+ Labor Categories, does the State still require offerors to submit the Financial Proposal with this TORFP?

Answer: Yes, the Financial Proposal is required in response to the TORFP.

Question 84: What is the expected not-to-exceed ceiling amount of this Task Order? Also, are there any ceiling limitations for each Work Order?

Answer: Ceiling amounts will be set at the Work Order level which will not be known until proposals are received in response to a Work Order.

Question 85: Will the state allow tables and figures to be Arial Narrow 10 point size?

Answer: Yes.

Question 86: Can the State please clarify that Appendix 4 - Past Performance Rating Form should be sent to the Contractor POC for completion, then the POC should sent directly to the Contracting Officer?

Answer: **Appendix 4 – Past Performance Rating Form is required to be submitted with the technical proposal in response to the TORFP.**

Question 87: Please provide examples of the types of IT systems anticipated under this RFP. For example, does this include public safety communications?

Answer: **Requirements will be provided at the Work Order level.**

Question 88: The TORFP states on pg. 27, section 5.4.1.D: "Identify all proposed Subcontractors, including MBEs, and their intended purpose and roles in the performance of the scope of work hereunder." Can the State please confirm the only information vendors need to submit regarding the MBE goal is Attachment D-TORFP, the Acknowledgement of Work Order MBE Requirements form, and that vendors do not need to identify and name specific MBEs to satisfy the 20% MBE goal with their TORFP proposal?

Answer: **Yes. The identification of MBE partners will be at the Work Order level and not in response to the TORFP. Please refer to TORFP Section 4.7, MBE Participation Goal.**

Question 89: It appears that Sections 2.5 and 3.7.4 are duplicate. Is there were any difference in these two requirements

Answer: **Please refer to Amendment #3 to the TORFP.**

Question 90: Will the state align the references and past performance requirement to reflect the same number? Ie: currently request is for 3 references and 5 past performances--can we submit 3 references that are also the past performances? Otherwise there is no way to validate the non reference past performance.

Answer: **See Response to Question 54 in Questions and Responses #2.**

Question 91: What agencies are anticipated to participate in the DoIT IVV vehicle?

Answer: **This vehicle is for the sole use of DoIT for projects deemed to require an IV&V.**

Question 92: Will the state allow additional references to come from a subcontractor, ie: they are not on the CATS+ vendor list?

Answer: **Only one reference may come from a subcontractor. It is not required that the subcontractor be an approved CATS+ Master Contractor.**

Question 93: Are any of the projects scheduled for this vehicle also MITD projects?

Answer: **Currently there are no projects scheduled for an IV&V under this vehicle.**

Question 94: Please provide the CATS+ LCAT for 2.3.2.b IV&V Technical Resource

Answer: **The roles listed in the table in TORFP Section 2.3.2 are examples of the resources that may be required in a Work Order. Offerors are not required to propose labor categories in response to this section.**

Question 95: Who will be writing the requirements for the subsequent work orders? DoIT? Consultants to DoIT? Agency representatives?

Answer: **The Work Order requirements will be prepared by DoIT representatives which may include consultants.**

Question 96: About how many IVV's per year, would DoIT estimate will be requested as part of this Master Vehicle?

Answer: **That information is not available at this time.**

Question 97: Since this is an IV&V engagement will the awardee of this contract be conflicted out of work on the following other DOIT Projects or please advise the scope of conflict.

TO Number: F50B0600045
Title: Agile Team Resources

TO Number: F50B0600063
Title: Data Management and Analytic Services

TO Number: F50B0600039
Title: Delivery Program Management Services

Answer: **An entity cannot perform IV&V services on a project for which it is a service provider. Conflicts will be determined based**

upon a contractor's association, if any, with the project requiring IV&V services under a Work Order.

Question 98: The TORFP references Required resources in section 2.3.2. The required resources include IV&V Project Manager, IV&V Technical Resource, Business Analyst, Testing Specialist, and QA Manager. We were unable to find Labor Category Qualifications and a Rate Schedule for the IV&V Technical Resource and Business Analyst roles. Please direct us to the qualifications and rates for these two roles. We used the following references:

- CATS II RFP Section 2.10, Revised Labor Category Qualifications
- Consulting and Technical Services Plus (CATS+) Labor Rates, Attachment F-A1 Labor Rate Schedule
- F50B0600060 – IT Management Consulting Services, Functional Area 10, 2.3.2 Required Resources

Answer: The table in TORFP Section 2.3.2 contains examples of resources that may be required in Work Orders. Qualifications will be provided at the Work Order level. Please refer to TORFP Section 5.5, as amended by Amendment #3 for instructions regarding labor rates.

Question 99: Page 26, section 5.4.2.A.d: Can the Agency provide more details on what it expects in the sample project management plan? Is it ok if we provide you with a Work Breakdown Structure (WBS)?

Answer: The offeror is expected to provide a sample project management plan that describes its approach in conducting an IV&V.

Question 100: Key Information Sheet, Primary Place of Performance – Statewide: Can the Agency specify the duration of work in each such location and resources moved from one location to another?

Answer: Details will be provided at the Work Order level.

Question 101: Please confirm that resumes are not required with the proposal and they are required only at the time of Work Order.

Answer: Confirmed.

Question 102: Section 2.3.2.b IV&V Technical Resource – the position and the responsibilities appear to be open ended. Can the agency throw

some more light on this position to arrive at an appropriate labor category?

Answer: **No, please refer to the response to Question #94 in Q&A #3.**

Question 103: Are organizations providing solutions to the Agency and State precluded from participating in this TORFP as this may cause a Conflict of Interest?

Answer: **See Response to Question No. 97.**

Question 104: Also, will Master Contractors who are awarded this TORFP be precluded from participating in future solution RFPs on which IV&V will be performed?

Answer: **No. But see Response to Question No. 97.**

Question 105: Page 27, section 5.4.2.C – Staffing Management Plan: Can the agency increase the page limit to 6 as we need include images including the organization chart and biographical data of management staff.

Answer: **No.**

Question 106: Page 27, section 5.4.2.E.a – can we use the Past Performance Rating Form that was obtained recently for another TORFP submission?

Answer: **The offeror can use the same Past Performance submitted in response to another TORFP, however a new form specific to TORFP #F50B0600060 must be completed.**

Question 107: Attachment B - Can the Agency please correct the error in the formula in cell D14 and reissue the Excel sheet?

Answer: **Please see Amendment #3 revising Attachment B.**

Question 108: Can the Agency please clarify the difference between the value in cells D17 and D18?

Answer: **There is no difference between the values, offerors will be evaluated financially on the Total Evaluated Proposed Price.**

Question 109: Can we submit team qualification including our subcontractors to meet the offeror experience?

Answer: Please refer to TORFP Sections 5.4.2.E and 6.2.1.

Question 110: Do we need to present any resume while responding to this TORFP ? or do we have to propose resume only at work order level?

Answer: Please see the response to Question #101.

Question 111 Can we submit sub contractor qualification to meet the offeror evaluation criteria ?

Answer: See the response to Question #109.

Question 112: Can the agency make this solicitation and SBR?

Answer: No. This TORFP is approved for 20% MBE Subcontracting Goal.

Question 113: As there is only 2 weeks post question submission for the due date, we would like the agency to consider extending the deadline which will time for the agency to respond to the clarification and it will help the offeror to incorporate those changes.

Answer: No. See Amendment #2

Question 114: Who are all the incumbent vendors performing IV and V services to the agency?

Answer: Certain vendors are providing IV&V services to the Department, however, there are no “incumbents” as this is a new solicitation for future IV&V requirements. Information regarding any IV&V TORFP released under the CATS+ Master Contract can be found on the CATS+ status webpage located at:
<https://doit.maryland.gov/contracts/Pages/CATSPPlusTORFPStatus.aspx>.

Question 115: Will the selected contractors need to be performing IV and V services for the agencies outside DOIT?

Answer: No.

Question 116: Are there established protocols/ policies with respect to workplace social distancing and safety measures? If so please share them.

Answer: This information will be provided at the Work Order level.

Question 117: Will telework be authorized under the resulting Award(s)?

Answer: The determination for telework will be made at the Work Order level.

Question 118: Are there any incumbents? If so, please share the information.

Answer: See Response to Question No. 114.

Question 119: Has the Government established and funded the overall budget for this Procurement or will budgets be determined and funded at the Order level?

Answer: At the Work Order level.

Question 120: Appendix 4 has been provided as a form for the past performance examples. Please clarify whether the 3 references should fill out Appendix 4 for 3 of the 5 projects, or if 5 out of the 5 past performance examples require Appendix 4. Is there a purpose to having 3 references if 5 different people are filling out Appendix 4 and essentially providing a reference?

Answer: Offerors are to provide 5 past performances on Appendix 4. The 3 references are separate from the past performances, are not to be submitted on Appendix 4, and are to include the information required in 5.4.2.E.a.1 through 5. Appendix 4 requires additional information not required in the reference. See the response to Question #54 from Q&A #2.

Question 121: Several key references are not able to provide anything in writing, per directions from their state government. Could those references provide verbal feedback in place of Appendix 4? We could still provide their contact information in Appedix 4, but they would not be able to answer the questions.

Answer: Please provide the Appendix 4 and indicate that the responses to the questions will require verbal contact. Also, offerors are cautioned to provide contact information for the reference that is current and that the reference will respond. As references are part of the evaluation of a proposal, it is important that the State is able to make contact with the reference.

Question 122: Section 5.4.2.E. sub paragraph a. states that “The Master Contractor shall provide three references and five past performances (submit Appendix 4 for past performances) for contracts completed within the last five years (no more than one may come from a Subcontractor), that were similar to the requested scope of work.”

Please advise if the three (3) references provided can be used as three (3) of the five (5) past performances submitted via Appendix 4.

Answer: Yes.

Question 123: Section 5.4.2.E. sub paragraph b. states that “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.”

Please confirm this is intended to cover only State entities (agencies, departments, offices) and does not include local entities within the State of Maryland such as cities and counties.

Answer: Confirmed.

Question 124: The Attachment B instructions state “Except as instructed on the Financial Proposal Form, nothing shall be entered on or attached to the Financial Proposal Form that alters or proposes conditions or contingencies on the prices. Alterations and/or conditions may render the Proposal not reasonably susceptible of being selected for award.” However, RFP Section 5.5.2 states that “Offerors TO Financial Proposal shall contain a description of any assumptions on which the Master Contractor’s TO Financial Proposal is based.”

Should Offerors include Assumptions related to the TO Financial Proposal in the Excel file (e.g., a new tab), or only as a separate attachment included with the PDF submittal of the TO Financial Proposal?

Answer: Provide as an attachment to the TO Financial Proposal response.

Question 125: Section 5.5.3 states “To be responsive to this TORFP, the Financial Proposal Form shall provide labor rates for all labor roles anticipated for this TORFP.”

Does the State allow the Offeror to add, remove, or change the roles listed in the Financial Proposal template to reflect roles anticipated for this TORFP by the Offeror? Or must the Offeror only provide rates for the exact five roles anticipated for this TORFP by the State?

Answer: **Please follow the instructions in TORFP Section 5.5. See also Response to Question No. 98.**

Question 126: How many engagements are expected to occur each year?

Answer: **The number of required IV&Vs is not know at this time.**

Question 127: Will the job specifications for each work order be descriptive for each role, specifically for roles like the technical resource?

Answer: **Yes.**

Question 128: Has the state considered changes to certain requirements for onsite support (temporarily or permanently) due to Covid-19 issues?

Answer: **Requirements will be provided at the Work Order level.**

Question 129: Is there a standard set of technologies and / or targeted business applications that are candidates for the first round of IV&V's?

Answer: **No.**

Question 130: How many IV&V TO's has the State released in the last year?

Answer: **See Response to Question No. 114.**

Question 131: Will any of this effort require onsite visits?

Answer: **Requirements will be provided at the Work Order level.**

Question 132: What are the COVID-19 Polices and Procedures?

Answer: **Will be provided at the Work Order level.**

Question 133: 2.3 IV&V Requirement's 2.3.1.J. Perform Certification and Accreditation assessments - What Certification and Accreditation assessments do you normally perform?

Answer: **C&A assessments, if required, will be detailed at the Work Order level.**

Question 134: 2.3.2 Required resources may include: 2.3.2.a IV&V Project Manager - will each Master Contractor have its own IV&V Project Manager / Team?

Answer: **Requirements will be provided at the Work Order level.**

Question 135: 2.3.2.d. Testing Specialist - Products are ready for production - this is a very generic statement and not usually the IV&V Teams responsibility. Is the State asking us to define this effort?

Answer: **The table in Section 2.3.2 contains examples of resources and their potential duties and responsibilities. Specific requirements will be established at the Work Order level.**

Question 136: 3.6.5 Data Protection and Controls - Does the State use the NIST Standards for their Security protocols? If not, what do they use?

Answer: **The requirement speaks to the contractor's ability to ensure a secure environment. Such Security Best Practices must comply with an accepted industry standard, such as the NIST cybersecurity framework.**

Question 137: 3.7.4 TO Contractor Personnel Maintain Certifications - Any TO Contractor Personnel provided under this TORFP must maintain in good standing any required professional certifications for the duration of the TO Agreement. Are there any Certifications required?

Answer: **This requirement has been removed, please refer to Amendment #3 to the TORFP.**

Question 138: 3.7.5 Work Hours A. Business Hours Support: TO Contractor shall assign TO Contractor Personnel to support Normal State Business Hours (8:00 AM to 5:00 PM), Monday through Friday except for State holidays. What are the MD State Holidays?

Answer: **Here's the link for Maryland State Holidays:**
<https://sos.maryland.gov/Pages/State-Holidays.aspx>

Question 139: In Section 3.7.2, one of the requirements is "A. Seasoned, demonstrable, extensive experience in large-scale IT projects, with budgets of \$25,000,000+, in a number of federal, State or local agencies." Is this experience for individual projects \$25 million plus,

or is this for an aggregate of projects that are worth \$25 million plus? Also, is this experience supposed to be IV&V of those projects, or rather experience with large IT projects?

Answer: **The demonstrated experience is for IV&V of IT projects each with a budget of \$25,000,000+**

Question 140: For the 30-page limit in Section 5.4.2.b, please confirm if the 30 pages also includes items like the Sample Risk Assessment (5.4.2.c) and the Sample Project Management Plan (5.4.2.d).

Answer: **No, they have their own page limit.**

Question 141: Please confirm that resumes are not required for the technical proposal

Answer: **Please see the response to Question #101.**

Question 142: For evaluation criteria 6.2.3 "Written and verbal presentation skills," please confirm that the oral aspect would only be assessed if DoIT decides to have oral presentations.

Answer: **Master Contractors will not be evaluated on verbal presentation skills if it does not hold oral presentations or discussions.**

Question 143: For the minimum qualifications listed in Section 1, please clarify what is the expectation for the vendor to meet the minimum criteria other than use labor categories of CATS Plus, Section 2.10, within the work order basis.

Answer: **There are no other minimum qualifications.**

Question 144: For Appendix 4, please confirm that the completed form must be submitted with the Technical Proposal by the Offeror and not from the rater.

Answer: **As instructed in the table in TORFP Section 7, submit Appendix #4 with the technical proposal.**

Question 145: Section 2.2 makes reference to Section 3.10 for specific IV&V services. However, Section 3.10 refers to VSBE Reports. Please update the reference for which this should be referring to.

Answer: **Please refer to Amendment #3 to the TORFP.**

Question 146: Please confirm that some of the forms within Attachment D such as D-3A, D-3B, D-4A (reports), D -5 won't be required for this TORFP submission, however they are required once the TO is awarded

Answer: Please refer to Amendment #3 to the TORFP. D-3A and D-3B are due 10 Business Days after recommended award of a Work Order. Reports are due as instructed in the forms.

Question 147: Can an offeror submit their qualification gained as subcontractor on another project?

Answer: Yes.



MARYLAND DEPARTMENT OF GENERAL SERVICES
OFFICE OF THE SECRETARY

Amendment #4

Consulting and Technical Services+ (CATS+)
Task Order Request for Proposals (TORFP)
#F50B0600060
Independent Verification and Validation

September 24, 2020

Ladies/Gentlemen:

This Amendment 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. Amend TORFP Section 5.4.E Master Contractor and Subcontractor Experience and Qualifications (reference Section 3.7.2) as follows:

The Master Contractor shall provide three references ~~and five past performances (submit Appendix 4 for past performances)~~ for contracts completed within the last five years (no more than one may come from a Subcontractor), that were similar to the requested scope of work.

2. Amend TORFP Section 7 – TORFP Attachments and Appendices table as follows:

	Label	Appendix Name
When to Submit		
With Technical Proposal	4	Past Performance Rating Form

3. **Appendix 4. Past Performance Rating Form is removed from the TORFP.**

Issued by:
Dapheny McCray
Procurement Officer

