

Consulting and Technical Services+ (CATS+)
Task Order Request for Proposals (TORFP)

Department of Health and Mental Hygiene (DHMH)
IT Staff Support: SharePoint Developer / Mainframe
Programming

CATS+ TORFP # M00B4400469

DHMH-OPASS # 14-13955



Issue Date: April 28, 2014

SMALL BUSINESS RESERVE (SBR)

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KEY INFORMATION SUMMARY SHEET

This CATS+ TORFP is issued to obtain the services necessary to satisfy the requirements defined in Section 2 - Scope of Work. All CATS+ Master Contractors approved to perform work in the Functional Area under which this TORFP is released shall respond to this TORFP with either a Task Order (TO) Proposal to this TORFP or a Master Contractor Feedback form (See Section 3).

TORFP Title:	DHMH IT Staff Support: SharePoint Developer / Mainframe Programming		
TO Project Number (TORFP #):	M00B4400469		
Functional Area:	FA5 – Software Engineering		
TORFP Issue Date:	04/28/2014		
Questions Due Date and Time:	05/09/2014 at 2:00 PM Local Time		
Closing Date and Time:	05/20/2014 at 2:00 PM Local Time		
TORFP Requesting Agency:	Department of Health and Mental Hygiene (DHMH) Office of Information Technology (OIT)		
Send Questions and Proposals to:	Michael Howard Michael.Howard@maryland.gov		
TO Procurement Officer:	Michael Howard Office Phone Number: 410-767-0974 Office Fax Number: 410-333-9598		
TO Manager:	Phil Hemler Office Phone Number: 410-767-6981 Office Fax Number: 410-333-7545 email address: Phil.Hemler@maryland.gov		
TO Type:	Time & Materials		
Period of Performance:	Five (5) Years		
MBE Goal:	0%		
VSBE Goal:	0%		
Small Business Reserve (SBR):	Yes		
Primary Place of Performance:	DHMH Office of Information Technology 201 W. Preston Street Baltimore MD 21201		
TO Pre-proposal Conference:	DHMH 201 W. Preston Street, L1 Baltimore MD 21201 05/02/2014 at 2:30 PM Local Time See Attachment 6 for directions.		

SECTION 1 - ADMINISTRATIVE INFORMATION

1.1 TORFP SUBJECT TO CATS+ MASTER CONTRACT

In addition to the requirements of this TORFP, the Master Contractors are subject to all terms and conditions contained in the CATS+ RFP issued by the Maryland Department of Information Technology (DoIT) and subsequent Master Contract Project Number 060B2490023, including any amendments.

All times specified in this document are local time, defined as Eastern Standard Time or Eastern Daylight Time, whichever is in effect.

1.2 ROLES AND RESPONSIBILITIES

Personnel roles and responsibilities under the TO:

- **TO Procurement Officer** – The TO Procurement Officer has the primary responsibility for the management of the TORFP process, for the resolution of TO Agreement scope issues, and for authorizing any changes to the TO Agreement.
- **TO Manager** - The TO Manager has the primary responsibility for the management of the work performed under the TO Agreement; administrative functions, including issuing written directions; ensuring compliance with the terms and conditions of the CATS+ Master Contract.

The TO Manager will assign tasks to the personnel provided under this TORFP and will track and monitor the work being performed through the monthly accounting of hours deliverable for work types; actual work produced will be reconciled with the hours reported.

- **TO Contractor** – The CATS+ Master Contractor awarded the TO Agreement. The TO Contractor shall provide human resources as necessary to perform the services described in this TORFP Scope of Work.
- **TO Contractor Manager** - TO Contractor Manager will serve as primary point of contact with the TO Manager to regularly discuss progress of tasks, upcoming tasking, historical performance, and resolve any issues that may arise pertaining to the TO contractor support personnel. The TO Contractor Manager will serve as liaison between the TO Manager and the senior TO Contractor management.

The TO Contractor will provide invoices as specified under Section 2.12 Invoicing. The TO Contractor is responsible for making payments to the TO Contractor personnel.

- **TO Contractor Personnel** – Any resource provided by the TO Contractor in support of this TORFP over the course of the TORFP period of performance.
- **Proposed Personnel** – Any individual named in the TO Proposal by the Master Contractor to perform work under the scope of this TORFP. Proposed personnel shall start as of TO Agreement issuance unless specified otherwise.

1.3 TO AGREEMENT

Based upon an evaluation of TO Proposal responses, a Master Contractor(s) will be selected to conduct the work defined in Section 2 - Scope of Work. A specific TO Agreement, Attachment 3, will then be entered into between the State and the selected Master Contractor(s), which will bind the selected Master Contractor (TO Contractor(s)) to the contents of its TO Proposal, including the TO Financial Proposal.

1.4 TO PROPOSAL SUBMISSIONS

The TO Procurement Officer will not accept submissions after the date and exact time stated in the Key Information Summary Sheet above. The date and time of submission is determined by the date and time of arrival in the TO Procurement Officer's email inbox.

1.5 ORAL PRESENTATIONS/INTERVIEWS

All Master Contractors and proposed staff will be required to make an oral presentation to State representatives in the form of interviews. Significant representations made by a Master Contractor during the oral presentation shall be submitted in writing. All such representations will become part of the Master Contractor's proposal and are binding, if the TO Agreement is awarded to the Master Contractor. The Procurement Officer will notify Master Contractor of the time and place of interviews.

Interviews, which are a type of oral presentation, will be performed in person for all Offerors meeting minimum qualifications. All candidates shall be interviewed in substantially the same manner.

In the event of more than 10 responsive bids to this TORFP, the DHMH may schedule at the Procurement Officer's discretion multiple rounds of interviews that narrow the number of subsequent interviews to the most qualified proposed resources (i.e., perform down selects). Additional details regarding the multiple interview process and down selects are described in Section 4.3 Selection Procedures.

1.6 QUESTIONS

All questions must be submitted via email to the TO Procurement Officer no later than the date and time indicated in the Key Information Summary Sheet. Answers applicable to all Master Contractors will be distributed to all Master Contractors who are known to have received a copy of the TORFP.

Answers can be considered final and binding only when they have been answered in writing by the State.

1.7 TO PRE-PROPOSAL CONFERENCE

A pre-proposal conference will be held at the time, date and location indicated on the Key Information Summary Sheet. Attendance at the pre-proposal conference is not mandatory, but all Offerors are encouraged to attend in order to facilitate better preparation of their proposals.

Seating at pre-proposal conference will be limited to two (2) attendees per company. Attendees should bring a copy of the TORFP and a business card to help facilitate the sign-in process.

The pre-proposal conference will be summarized in writing. As promptly as is feasible subsequent to the pre-proposal conference, the attendance record and pre-proposal summary will be distributed via email to all Master Contractors known to have received a copy of this TORFP.

In order to assure adequate seating and other accommodations at the pre-proposal conference please email the TO Procurement Officer indicating your planned attendance no later than three (3) business days prior to the pre-proposal conference. In addition, if there is a need for sign language interpretation and/or other special accommodations due to a disability, please contact the TO Procurement Officer no later than five (5) business days prior to the pre-proposal conference. The Department of Health and Mental Hygiene will make reasonable efforts to provide such special accommodation.

1.8 CONFLICT OF INTEREST

The TO Contractor(s) awarded the TO Agreement shall provide IT technical and/or consulting services for State agencies or component programs with those agencies, and shall do so impartially and without any conflicts of interest. Each Master Contractor shall complete and include with its TO Proposal a Conflict of Interest Affidavit and Disclosure in the form included as Attachment 4 of this TORFP. If the TO Procurement Officer makes a determination that facts or circumstances exist that give rise to or could in the future give rise to a conflict of interest within the meaning of COMAR 21.05.08.08A, the TO Procurement Officer may reject a Master Contractor's TO Proposal under COMAR 21.06.02.03B.

Master Contractors should be aware that the State Ethics Law, State Government Article, §15-508, might limit the selected Master Contractor's ability to participate in future related procurements, depending upon specific circumstances.

By submitting a Conflict of Interest Affidavit and Disclosure, the Master Contractor shall be construed as certifying all personnel and subcontractors are also without a conflict of interest as defined in COMAR 21.05.08.08A.

1.9 LIMITATION OF LIABILITY

The TO Contractor's liability is limited in accordance with Section 27 of the CATS+ Master Contract. TO Contractor's liability for this TORFP is limited to 2 times the total TO Agreement amount.

1.10 CHANGE ORDERS

If the TO Contractor(s) 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(s) 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 and executed by the TO Procurement Officer.

1.11 TRAVEL REIMBURSEMENT

Expenses for travel performed in completing tasks for this TORFP shall not be reimbursed.

1.12 MINORITY BUSINESS ENTERPRISE (MBE)

This TORFP has MBE goals and sub-goals as stated in the Key Information Summary Sheet above.

1.13 VETERAN OWNED SMALL BUSINESS ENTERPRISE (VSBE)

This TORFP has a VSBE subcontract participation goal as stated in the Key Information Summary Sheet above, representing the percentage of total fees paid for services under this TO. By submitting a response to this solicitation, the bidder or offeror agrees that this percentage of the total dollar amount of the contract will be performed by verified veteran-owned small business enterprises.

1.14 NON-DISCLOSURE AGREEMENT**1.14.1 NON-DISCLOSURE AGREEMENT (OFFEROR)**

A reading room is currently not anticipated for this TORFP, however in the event that the need arises, the following applies:

Certain system documentation may be available for potential Offerors to review at a reading room at DHMH's address. Offerors who review such documentation will be required to sign a Non-Disclosure Agreement (Offeror) in the form of Attachment 10. Please contact the TO Procurement Officer to schedule an appointment.

1.14.2 NON-DISCLOSURE AGREEMENT (TO CONTRACTOR)

Certain system documentation may be required by the TO Contractor awarded the TO Agreement in order to fulfill the requirements of the TO Agreement. The TO Contractor, employees and agents who review such documents will be required to sign, including but not limited to, a Non-Disclosure Agreement (TO Contractor) in the form of Attachment 11.

1.15 LIVING WAGE

The Master Contractor(s) shall abide by the Living Wage requirements under Title 18, State Finance and Procurement Article, Annotated Code of Maryland and the regulations proposed by the Commissioner of Labor and Industry. An Affidavit of Agreement shall be submitted as part of the Master Contract Agreement in accordance with the CATS+ Master Contract.

All TO Proposals shall be accompanied by a completed Living Wage Affidavit of Agreement, Attachment 13 of this TORFP.

1.16 IRANIAN NON-INVESTMENT

All TO Proposals shall be accompanied by a completed Certification Regarding Investments in Iran, Attachment 16 of this TORFP.

1.17 CONTRACT MANAGEMENT OVERSIGHT ACTIVITIES

DoIT is responsible for contract management oversight on the CATS+ Master Contract. As part of that oversight, DoIT has implemented a process for self-reporting contract management activities of TOs under CATS+. This process shall typically apply to active TOs for operations and maintenance services valued at \$1 million or greater, but all CATS+ TOs are subject to review.

Attachment 12 is a sample of the TO Contractor Self-Reporting Checklist. DoIT will send initial checklists out to applicable TO Contractors approximately three months after the award date for a TO.

The TO Contractor(s) shall complete and return the checklist as instructed on the form. Subsequently, at six month intervals from the due date on the initial checklist, the TO Contractor(s) shall update and resend the checklist to DoIT.

1.18 MERCURY AND PRODUCTS THAT CONTAIN MERCURY

THIS SECTION IS NOT APPLICABLE TO THIS TORFP.

1.19 PURCHASING AND RECYCLING ELECTRONIC PRODUCTS

THIS SECTION IS NOT APPLICABLE TO THIS TORFP.

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SECTION 2 - SCOPE OF WORK

2.1 PURPOSE

The DHMH, Office of Information Technology (OIT) is issuing this CATS+ TORFP to obtain the services of two (2) individuals to provide 1) SharePoint Developer services, and 2) mainframe programming and analysis services. All services shall be provided onsite at DHMH Headquarters at 201 W. Preston Street, Baltimore, MD 21201 and the individuals hired under this Task Order (TO) shall work under the supervision of OIT personnel.

Master Contractors may propose for one or both positions, however, Master Contractors shall not propose more than one (1) individual per position. DHMH may make a single award to a TO Contractor for both positions or may make awards to two different TO Contractors, with each TO Contractor awarded one position. Therefore, if a Master Contractor proposes candidates for both positions, they will be independently evaluated.

2.2 REQUESTING AGENCY BACKGROUND

The OIT's mission is to coordinate, plan, develop and maintain department-wide information resources necessary to support DHMH to provide technological support, information services and electronic communications in a prompt, secure and reliable fashion; to recommend uniform information technology policies, standards and procedures; and to assure access to accurate, timely and complete information in accordance with the DHMH Information Technology Master Plan.

The OIT, Application Division (AD), provides systems analysis, design, programming support (using .NET, RPG, and COBOL) and application level security for server, midrange and mainframe based applications and databases which are accessible via the internet and/or intranet.

The OIT Administration and Operations Division (AOD) maintains the DHMH website which consists of 872,000 web pages on SharePoint Server 2010 and maintains the DHMH SharePoint Server Farm. In addition, the DHMH master website template is maintained by AOD. The DHMH website averages 700,000 visits per month.

2.3 PROJECT BACKGROUND

The Department is seeking two (2) individuals to provide services as described in Section 2.1. The services have been provided by a CATS II TO Contractor since 2009. The new TO shall provide for a continuation of those services, with specific tasks and projects directed by the OIT.

2.4 PROFESSIONAL DEVELOPMENT

The TO Contractor(s) shall ensure continuing education opportunities for the personnel provided to support this TORFP. Further, any IT services personnel obtained under this TORFP shall maintain any required professional certifications for the duration of the resulting TO.

Actual course costs, travel, and related expenses are the responsibility of the TO Contractor(s). Eligible continuing education shall be associated with technologies currently used or anticipated for use by the DHMH in the near future.

2.5 REQUIRED POLICIES, GUIDELINES AND METHODOLOGIES

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

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

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

- The State of Maryland System Development Life Cycle (SDLC) methodology
- The State of Maryland Information Technology Security Policy and Standards
- The State of Maryland Information Technology Non-Visual Access Standards
- The TO Contractor(s) shall follow project management methodologies consistent with the Project Management Institute's Project Management Body of Knowledge Guide.
- TO Contractor assigned personnel shall follow a consistent methodology for all TO activities.

2.6 REQUIREMENTS

2.6.1 FUNCTIONAL / BUSINESS REQUIREMENTS

TO Contractor(s) resources assigned to this TO Agreement shall:

ID #	Functional / Business Requirements
Positions #1: SharePoint Developer	
2.6.1.1	Provide maintenance of www.dhmh.maryland.gov , numerous sub-sites and various DHMH intranet sites using SharePoint
2.6.1.2	Use SharePoint and InfoPath to create applications for DHMH on an as-needed basis
Provide SharePoint programming development and maintenance in support of the following programs within DHMH:	
2.6.1.3	Alcohol and Drug Abuse Administration
2.6.1.4	Behavioral Health and Disabilities
2.6.1.5	Developmental Disabilities Administration
2.6.1.6	Maternal and Child Health Bureau
2.6.1.7	Medicaid/ Medical Care Programs
2.6.1.8	Maryland Health Care Commission
2.6.1.9	Mental Hygiene Administration
2.6.1.10	Office of Preparedness and Response

ID #	Functional / Business Requirements
Position #2: Mainframe Programmer/Analyst	

Provide mainframe programming maintenance and development in support of the following programs within DHMH:	
2.6.1.11	Fiscal Services Administration
2.6.1.12	Division of General Accounting
2.6.1.13	Division of Budget Analysis
2.6.1.14	Division of Cost Accounting and Reimbursement
2.6.1.15	Office of Human Resources
2.6.1.16	Timekeeping Unit
2.6.1.17	Payroll Unit
2.6.1.18	Vital Statistics Administration (deaths, marriages, divorces)
2.6.1.19	The Children's Medical Services (CMS) program
2.6.1.20	Boards and Commissions (Licensing Clearance System)

2.6.2 TECHNICAL REQUIREMENTS

TO Contractor(s) resources assigned to this TORFP shall:

ID #	Technical Requirements / Duties and Responsibilities
Position #1: SharePoint Developer	
2.6.2.1	Develop test cases and track issues through a SharePoint 2010 Bug Tracking tool
2.6.2.2	Maintain source code, documentation and status reports in Microsoft TFS 2010
2.6.2.3	Provide helpdesk assistance (troubleshooting support) to users
2.6.2.4	Maintain SharePoint database security (create and maintain users and roles, assign privileges)
2.6.2.5	Perform SQL Server Database 2008 R2 tuning, enhancing, administration and performance monitoring
2.6.2.6	Maintain Database Design using Visio 2010
2.6.2.7	Write TSQL statements and Stored Procedures
2.6.2.8	Maintain documentation and standards
2.6.2.9	Maintain SharePoint site(s) using Visual Studio 2010
2.6.2.10	Maintain Change Control Log Document and Implement Change Requests
2.6.2.11	Maintain, and test backup & recovery strategies
2.6.2.12	Configure and maintain SQL Server 2008 R2 database mirroring in High Availability Operation Mode using certificates
2.6.2.13	Create, monitor and troubleshoot SQL Server 2008 R2 jobs
2.6.2.14	Move, rebuild, or change production database objects
2.6.2.15	Test and install windows update on Development, QA and Production Windows 2008 R2 servers
2.6.2.16	Administer Development, QA and Production Windows 2008 R2 servers
2.6.2.17	Build and deploy SharePoint Server 2010 website(s) to Development, QA and Production Windows 2008 R2 servers
2.6.2.18	Check application log for warning and error messages for service startup errors, application or database errors
2.6.2.19	Check IIS/database/application logs for warning and error messages

2.6.2.20	Administration and Configuration of SQL Server Reporting Services
2.6.2.21	Follow SDLC (such as the MD Government SDLC found at: http://doit.maryland.gov/SDLC) standards and procedures.
2.6.2.22	Create and Maintain Project Schedule in MS Project.
2.6.2.23	Manage the SharePoint Central Administrator Services (this includes: managing the SharePoint SQL Server database, web services, user profile synchronization, timer jobs etc.)
2.6.2.24	Work with the DHMH –OIT Web Team for: Administration - managing SharePoint services (in central administration), creating and managing technical issues on sites, checking: health analyzer, database and timer jobs.
2.6.2.25	Work with the DHMH –OIT Web Team to: check the health of the SharePoint, SQL Server database, perform/verify SharePoint database backup and restore, monitor allocation of SharePoint disk space
2.6.2.26	Create Custom Workflows within/using SharePoint Server 2010, NINTEX and Visual Studio 2010 (outside of the SharePoint “predefined” workflows and beyond a simple “three-state/phase” standard workflow)
2.6.2.27	Mentor DHMH-OIT staff in the various features of SharePoint Server 2010 Enterprise
2.6.2.28	Create and manage SharePoint Server Libraries
2.6.2.29	Create and manage a SharePoint Server Farm
2.6.2.31	Perform other duties within the general scope of this TORFP as directed by the TO Manager.

ID #	Technical Requirements/ Duties and Responsibilities
Position #2: Mainframe Programmer/Analyst	
2.6.2.32	In accordance with Section 2.6.5 Service Level Agreement (SLA), respond to system users to provide technical solutions to resolve programming issues that are specific to their daily operation.
2.6.2.33	Update/create Job Control Language (JCL), flowcharts, and control procedures.
2.6.2.34	In accordance with Section 2.6.5 SLA, resolve mainframe production system abnormal job terminations/ends ABENDs. Systems shall be returned to production before next schedule run.
2.6.2.35	Work directly with users and using available documentation, be able to identify systems, identify problems and resolve problems.
2.6.2.36	Create ad-hoc assistance/reports using mainframe utilities such as: VISION RESULTS and SYNC SORT.
2.6.2.37	Document all system modifications as required by the OIT Quality Assurance Unit to implement production jobs.
2.6.2.38	In accordance with Section 2.6.5 SLA, troubleshoot mainframe system problems – perform analysis and diagnose production system problems and implement changes to resolve problems in Customer Information Control System (CICS) programs, Batch System Reports, or data files.
2.6.2.39	Provide mainframe application maintenance/development and VSAM (sequential, dynamic) data file expertise to OIT staff and DHMH.
2.6.2.40	Perform software (COBOL application and VSAM (sequential, dynamic data files) development, modifications, testing (test cases & test data), and implementation.
2.6.2.41	Provide suggestions for efficiencies in the methods DHMH OIT uses for maintaining code and enhancing mainframe systems. After peer review, implement approved recommendations.
2.6.2.42	Maintain documentation and status reports in Microsoft Visual SourceSafe.
2.6.2.43	Create technical documentation of all implemented changes.

2.6.2.44	Create and modify dataflow and/or system flow diagrams.
2.6.2.45	Identify files necessary for Disaster Recovery (and participate in the testing).
2.6.2.46	Document changes to programs (and new programs developed) for end users.
2.6.2.47	Expand files and fields.
2.6.2.48	Monitor capacity and recommend system storage (Plan for and estimate future storage requirements).
2.6.2.49	Follow SDLC (such as the MD Government SDLC found at: http://doit.maryland.gov/SDLC) standards and procedures.
2.6.2.50	Create and maintain Project Schedule in Microsoft Project.
2.6.2.51	Integrate multiple applications using mainframe FTP (within the mainframe and with external (non-mainframe) systems).
2.6.2.52	Perform other duties within the general scope of this TORFP as directed by the TO Manager.

2.6.3 TO CONTRACTOR(S) RESPONSIBILITIES

The TO Contractor(s) shall provide staffing and resources to fully supply the following services as identified in Section 2.6 Requirements:

- Provide Staffing to support personnel requirements as described in Section 2.6.2.
- Provide Backup and Recovery Services as described in Section 2.6.6.

2.6.4 TO CONTRACTOR PERSONNEL DUTIES AND RESPONSIBILITIES

At a minimum, TO Contractor(s) personnel under this TORFP shall perform the following recurring duties. Frequency will be determined by the TO Manager.

Position #1: SharePoint Developer

The SharePoint Developer shall:

2.6.4.1	Provide SharePoint development, database administration and web-based expertise and advice to OIT staff and DHMH
2.6.4.2	Function as DHMH web administrator and shall be involved with the day-to-day content development/management or designing of www.dhmh.maryland.gov sub-sites
2.6.4.3	Perform software (SharePoint & database) development, modifications, testing, and implementation
2.6.4.4	Prepare documentation to describe new or changed processes
2.6.4.5	Provide troubleshooting support for the DHMH-OIT
2.6.4.6	Provide ad hoc assistance to the clients
2.6.4.7	Function as a Senior Level Lead SharePoint Architect/Developer for OIT and DBA for the SharePoint SQL Server database
2.6.4.8	Maintain the SharePoint Server Farm (in the development, staging and production environments)
2.6.4.9	Report directly to the OIT-Administrative Operations Division Director

Position #2: Mainframe Programmer/Analyst

The Mainframe Programmer/Analyst shall:

2.6.4.10	Function as a Senior Level Lead Mainframe Programmer/Analyst for OIT
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2.6.4.11	Provide helpdesk assistance (troubleshooting support) to mainframe users for the DHMH programs found in Section 2.6.1
2.6.4.12	Report directly to the OIT-AD Assistant Director
2.6.4.13	Perform the role of primary contact person for the administrations, divisions and programs found in Section 2.6.1
2.6.4.14	Identify new and/or modified data files for scheduled backups. This information shall be maintained in JCL format.

2.6.5 SERVICE LEVEL AGREEMENT (SLA)

Service Levels	Response Availability	On-Site Response to immediate supervisor	Comments
High (any situation that stops system production)	Five days/week, Mon-Fri, 7:30 AM - 6:00 PM	Four hours	Provide updates by COB each day until resolution
Normal (any situation where if nothing is done quickly it will effect production but does not require an immediate action)	Beginning of next business day.	One business day	Provide updates by COB each day until resolution
Low (any situation where the production is not interrupted and users can still access the applications)	Two business days	Two business days	Provide updates by COB each day until resolution

2.6.6 BACKUP / DISASTER RECOVERY

The TO Contractor(s) shall identify new and changed files and programs to be backed up on the DHMH web, application, and database servers on a regular/as needed basis (i.e. whenever code changes or data structures change). Backing up the TO Contractor's development code and development databases shall be the responsibility of the TO Contractor(s). The TO Contractor(s) shall participate in the periodic (annual) testing and validation of backups and restores.

The TO Contractor(s) shall identify new and/or modified data files for scheduled backups. This information shall be maintained in a SQL Server database format. Updates to this document shall occur within 72 hours from when new files have been created and/or when files have been modified.

2.6.7 REQUIREMENTS FOR HARDWARE, SOFTWARE, AND MATERIALS

The Department will provide work space with computers and software to perform all tasks.

2.6.8 WORK HOURS

- Business Hours Support: The TO Contractor's collective assigned personnel shall support core business hours (07:30 AM to 06:00 PM), Monday through Friday except for State holidays, Service Reduction days, and Furlough days observed by the Department of Health and Mental Hygiene. TO Contractor(s) personnel may also be required to provide occasional support outside of core business hours, including evenings, overnight, and weekends, to support specific efforts and emergencies to resolve system repair or restoration.

Scheduled Non-Business Hours Support: After hours support may be necessary to respond to IT Security emergency situations. Additionally, services may also involve some evening and/or weekend hours performing planned system upgrades in addition to core business hours. Hours performing system upgrades would be billed on actual time worked at the rates proposed.

- State-Mandated Service Reduction Days: TO Contractor(s) personnel shall be required to participate in the State-mandated Service Reduction Days as well as State Furlough Days. In this event, the TO Contractor(s) will be notified in writing by the TO Manager of these details.
- Minimum and Maximum Hours: Full-time TO Contractor(s) personnel shall work a minimum of 40 hours per week with starting and ending times as approved by the TO Manager. A flexible work schedule may be used with TO Manager approval, including time to support any efforts outside core business hours. TO Contractor(s) personnel may also be requested to restrict the number of hours TO Contractor(s) personnel can work within a given period of time that may result in less than an eight hour day or less than a 40 hour work week. Exceptions to the 40 hour week may be the result of leave, sick days, State holidays, or building closures.
- Vacation Hours: Requests for leave shall be approved by the TO Manager.

Attachment 20 shows scheduled State holidays for 2014 when State offices will be closed.

2.6.9 PERFORMANCE EVALUATION

TO Contractor(s) personnel will be evaluated by the TO Manager as needed for assignments performed during that period. The TO Manager shall evaluate performance of each TO Contractor(s) resource using the established performance evaluation form included as Attachment 18.

2.6.10 PERFORMANCE ISSUE MITIGATION

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

- A) The TO Manager shall document performance issues and give written notice to the TO Contractor(s), clearly describing problems and delineating remediation requirement(s).
- B) The TO Contractor(s) shall respond with a written remediation plan within three business days and implement the plan immediately upon written acceptance by the TO Manager.

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

2.6.11 SUBSTITUTION OF PERSONNEL AFTER AWARD

The substitution of personnel procedures is as follows:

- A) The TO Contractor may not substitute personnel without the prior approval of the TO Manager.
- B) To replace any personnel, the TO Contractor(s) shall submit resumes of the proposed personnel specifying their intended approved labor category. Any proposed substitute personnel shall have qualifications equal to or better than those of the replaced personnel.
- C) Proposed substitute personnel shall be approved by the TO Manager. The TO Manager shall have the option to interview the proposed substitute personnel. After the interview, the TO Manager shall notify the TO Contractor(s) of acceptance or denial of the requested substitution.

2.6.12 PREMISES AND OPERATIONAL SECURITY

- A) TO Contractor(s) employees and subcontractors may be subject to random security checks during entry and exit of State secured areas. The State reserves the right to require TO Contractor employees and subcontractors to be accompanied while on secured premises.
- B) TO Contractor(s) employees shall, while on State premises, display their State issued identification cards without exception.
- C) TO Contractor(s) shall require its employees to follow the State of Maryland and DHMH IT Security Policy and Standards throughout the term of the Contract.
- D) The State reserves the right to request that the TO Contractor(s) submit proof of employment authorization of non-United States citizens, prior to commencement of work under the resulting Contract.
- E) TO Contractor(s) shall remove any employee from working on the resulting Contract where the State of Maryland provides evidence to the TO Contractor(s) that said employee has not adhered to the security requirements specified herein.
- F) The cost of complying with all security requirements specified herein are the sole responsibilities and obligations of the TO Contractor(s) and its subcontractors and no such costs shall be passed through to or reimbursed by the State or any of its agencies or units.

2.7 DELIVERABLES

2.7.1 DELIVERABLE SUBMISSION

For every deliverable, the TO Contractor(s) shall request that the TO Manager confirm receipt of that deliverable by sending an Agency Receipt of Deliverable form (Attachment 8) with the deliverable. The TO Manager will acknowledge receipt of the deliverable via email using the provided form.

For every deliverable, the TO Contractor(s) shall submit by email an Agency Deliverable Product Acceptance Form (DPAF), provided as Attachment 9, to the TO Manager in MS Word (2007 or greater).

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

A standard deliverable review cycle will be elaborated and agreed-upon between the State and the TO Contractor(s). This review process is entered into when the TO Contractor(s) completes a deliverable.

For any written deliverable, the TO Manager may request a draft version of the deliverable, to comply with the minimum deliverable quality criteria listed in Section 2.7.3. Drafts of each final deliverable, except status reports, are required at least two weeks in advance of when the final deliverables are due (with the exception of deliverables due at the beginning of the project where this lead time is not possible, or where draft delivery date is explicitly specified). Draft versions of a deliverable shall comply with the minimum deliverable quality criteria listed in Section 2.7.3.

2.7.2 DELIVERABLE ACCEPTANCE

A final deliverable shall satisfy the scope and requirements of this TORFP for that deliverable, including the quality and acceptance criteria for a final deliverable as defined in Section 2.7.4 Deliverable Descriptions/Acceptance Criteria.

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

The TO Manager will issue to the TO Contractor(s) a notice of acceptance or rejection of the deliverable in the DPAF (Attachment 9). Following the return of the DPAF indicating "Accepted" and signed by the TO Manager, the TO Contractor(s) shall submit a proper invoice in accordance with the procedures in Section 2.11.2. The invoice must be accompanied by a copy of the executed DPAF or payment may be withheld.

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

Subsequent project tasks may not continue until deliverable deficiencies are rectified and accepted by the TO Manager or the TO Manager has specifically issued, in writing, a waiver for conditional continuance of project tasks.

2.7.3 MINIMUM DELIVERABLE QUALITY

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

Each deliverable shall meet the following minimum acceptance criteria:

- A) Be presented in a format appropriate for the subject matter and depth of discussion.
- B) Be organized in a manner that presents a logical flow of the deliverable's content.
- C) Represent factual information reasonably expected to have been known at the time of submittal.
- D) In each section of the deliverable, include only information relevant to that section of the deliverable.
- E) Contain content and presentation consistent with industry best practices in terms of deliverable completeness, clarity, and quality.
- F) Meets the acceptance criteria applicable to that deliverable, including any State policies, functional or non-functional requirements, or industry standards.
- G) Contains no structural errors such as poor grammar, misspellings or incorrect punctuation.

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

2.7.4 DELIVERABLE DESCRIPTIONS / ACCEPTANCE CRITERIA

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

Position #1: SharePoint Developer

ID #	Deliverable Description	Acceptance Criteria	Due Date / Timeframe
2.7.4.1	Documentation and Monthly Status Reports	<p>TO Contractor(s) personnel shall submit monthly status reports to the TO Manager. The status reports shall be submitted on or before the fifteenth day of the month following the reporting period and shall contain, as a minimum, the following information:</p> <ul style="list-style-type: none"> • Work accomplished during the reporting period via hours entered against tasks with DHMH-provided project management tools, to be used for updating work plans; • Planned activities for the next 	NTP + 30 Days and Monthly thereafter.

		<p>reporting period via new tasks, to be used for updating work plans with DHMH-provided project management tools; and</p> <ul style="list-style-type: none"> • A time report of the hours worked by each of the TO Contractor(s) personnel. 	
2.7.4.2	Code, Diagrams and Documentation	All code, diagrams and documentation created or changed for the project(s) shall be stored/copied to Windows SharePoint Services and the Visual Studio TFS at DHMH OIT within 48 hours of change.	NTP + 30 Days and Monthly thereafter as required.

Position #2: Mainframe Programmer/Analyst

ID #	Deliverable Description	Acceptance Criteria	Due Date / Timeframe
2.7.4.3	Documentation and Monthly Status Reports	<p>TO Contractor(s) personnel shall maintain documentation and status reports in Microsoft Visual SourceSafe. Status reports shall be submitted to the TO Manager and shall contain, at a minimum, the following information:</p> <ul style="list-style-type: none"> • Work accomplished during the reporting period via hours entered against tasks with DHMH-provided project management tools, to be used for updating work plans; • Planned activities for the next reporting period via new tasks, to be used for updating work plans with DHMH-provided project management tools; and • A time report of the hours worked by each of the TO Contractor(s) personnel. 	NTP + 45 Calendar days. Thereafter, the status reports shall be submitted on or before the fifteenth day of the month following the reporting period
2.7.4.4	Diagrams and Technical Documentation	<p>At a minimum, on a monthly basis, all diagrams and documentation created or changed for the project must be stored / copied to the Microsoft Windows SharePoint Services repository/server at DHMH OIT. These could include:</p> <ul style="list-style-type: none"> • Technical documentation of all implemented changes 	All diagrams and documentation shall be submitted on or before the fifteenth day of the month in conjunction with status reports.

		<ul style="list-style-type: none"> • Dataflow and/or system flow diagrams • Identify files necessary for Disaster Recovery (and participate in the testing) • Documented changes to programs (and new programs developed) for end users 	
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2.8 MINIMUM QUALIFICATIONS

2.8.1 OFFEROR'S COMPANY MINIMUM QUALIFICATIONS

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

- 1) At least two (2) years of demonstrated experience providing Information Technology development support services to U.S. based commercial or government entities with at least 2,000 end-users. In addition, the engagement must meet the following criteria:
 - i) At least one (1) engagement shall have lasted at least one year.

2.8.2 OFFEROR'S PERSONNEL MINIMUM QUALIFICATIONS

Only those Master Contractors supplying key proposed personnel that fully meet all minimum qualification criteria shall be eligible for TORFP proposal evaluation.

For the personnel proposed under this TORFP, proposed resources must meet all minimum qualifications for the labor category proposed, as identified in the CATS + Master Contract Section 2.10 plus the following minimum qualifications.

Resumes shall clearly outline starting dates and ending dates for each applicable experience or skills.

In addition to the minimum qualifications for the proposed labor categories, the proposed personnel must meet the following minimum qualifications.

Position #1: SharePoint Developer		
2.8.2.1	5 years of experience functioning as a Lead SharePoint Architect/Developer in working directly with end users in the Initiation, Planning, Executing, Monitoring & Controlling of multiple SharePoint Maintenance/Development projects.	
2.8.2.2	3 years of experience performing analysis of IT business problems.	
2.8.2.3	3 years of experience creating technical work requirements and test plans.	
	Mandatory Minimum Years of Experience	Software Specifics

2.8.2.4	7	Structured Query Language (SQL)
2.8.2.5	7	Microsoft SQL Server 2008/2005 (At least 3 years experience with 2008)
2.8.2.6	7	Internet Information Server (must have worked with either IIS version 7.0 or IIS version 7.5 for a total experience of 7 years)
2.8.2.7	7	JavaScript
2.8.2.8	7	XML
2.8.2.9	7	CSS
2.8.2.10	7	XHTML
2.8.2.11	3	Windows Server 2008 R2 Enterprise
2.8.2.12	5	.NET (4.5, 4.0, 3.5, 2.0) - NOTE: any combination of these versions for a total of 5 years
2.8.2.13	5	ASP.NET
2.8.2.14	5	VB.NET
2.8.2.15	2	AJAX
2.8.2.16	3	NINTEX (workflows)
2.8.2.17	5	SharePoint Server Enterprise 2010 or 2007 (1.5 years must be with 2010)
2.8.2.18	5	InfoPath 2010 or 2007 (1.5 years must be with 2010)
2.8.2.19	5	SharePoint 2010 or 2007 Workflows (1.5 years must be with 2010 and with developing CUSTOM Workflows)
2.8.2.20	Mandatory Minimum Certifications	Microsoft Certified Technology Specialist (MCTS): SharePoint 2010, Configuration and Microsoft Certified Technology Specialist (MCTS): SharePoint 2007, Application Development (Both or equivalent certification(s) required.)

Position #2: Mainframe Programmer/Analyst

2.8.2.21	5 years of experience functioning as a Lead Programmer/Analyst in working directly with end users in the Initiating, Planning, Executing, Monitoring & Controlling of four or more Mainframe Maintenance/Development projects	
2.8.2.22	3 years experience, performing analysis of business problems	
2.8.2.23	3 years Experience creating technical work requirements and test plans	
	Mandatory Minimum Years of Experience	Software Specifics
2.8.2.24	7	Requirements Analysis
2.8.2.25	7	COBOL II
2.8.2.26	7	VSAM
2.8.2.27	7	JCL
2.8.2.28	7	SYNCSORT
2.8.2.29	7	IDCAMS
2.8.2.30	7	CICS
2.8.2.31	7	TSO/ISPF
2.8.2.32	5	Vision:RESULTS DYL280
2.8.2.33	7	Writing FTP JCL Scripts to integrate mainframe applications and mainframe to non-mainframe applications
2.8.2.34	4	Microsoft Office 2007 or later

2.9 TO CONTRACTOR AND PERSONNEL OTHER REQUIREMENTS**OFFEROR'S PERSONNEL DESIREABLE QUALIFICATIONS**

Position #1: SharePoint Developer		
2.9.1	5	Microsoft Visio 2010 or 2007 (<i>1.5 years must be with 2010</i>)
2.9.2	4	Microsoft Visual Studio 2010 or 2008 (<i>1.5 years must be with 2010</i>)
2.9.3	1.5	Microsoft Team Foundation Server
2.9.4	3	Microsoft SQL Server Reporting Services
2.9.5	4	Microsoft Project 2010 or 2007 (<i>1.5 years must be with 2010</i>)

Position #2: Mainframe Programmer/Analyst		
2.9.6	3 Years	Microsoft Visio 2007 or later
2.9.7	3 Years	Microsoft Project 2010 or 2007
2.9.8	5 Years	Use of FOCUS (IBI) to create reports and perform data extractions

2.10 RETAINAGE

THIS SECTION IS NOT APPLICABLE TO THIS TORFP.

2.11 INVOICING

Invoicing shall be submitted monthly. Invoicing shall reflect costs for hours worked during the month and shall be accompanied by signed notice(s) of acceptance (DPAF) for all invoices submitted for payment. Payment of invoices will be withheld if a signed Acceptance of Deliverable Form (Attachment 9) is not submitted.

Invoice payments to the TO Contractor(s) shall be governed by the terms and conditions defined in the CATS+ Master Contract. Proper invoices for payment shall contain the TO Contractor's Federal Tax Identification Number, as well as the information described below, and shall be submitted to the TO Manager for payment approval.

Payment will only be made upon completion and acceptance of the deliverables as defined in Section 2.7.

2.11.1 TIME SHEET SUBMISSION AND ACCEPTANCE

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

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

- A) Title: "Time Sheet for IT Staff Support: SharePoint Developer / Mainframe Programming"
- B) Issuing company name, address, and telephone number
- C) For each employee /resource:
 - a) Employee / resource name

- b) For each week ending date, e.g., “Week Ending: mm/dd/yyyy” (weeks run Sunday through Saturday)
 - (1) Tasks completed that week and the associated deliverable names and ID#s
 - (2) Number of hours worked each day
 - (3) Total number of hours worked that week

D) Signature and date lines for the TO Manager

Submission of time sheets shall be to the TO Manager for approval by signature. TO Manager Acceptance of timesheets shall acknowledge the accuracy of the time reported.

2.11.2 INVOICE SUBMISSION PROCEDURE

This procedure consists of the following requirements and steps:

- A) A proper invoice shall identify “Department of Health and Mental Hygiene” as the recipient and contain the following information: date of invoice, TO Agreement number, deliverable description, deliverable number (e.g., “2.7.1.”), period of performance covered by the invoice, a total invoice amount, and a TO Contractor(s) point of contact with telephone number. Also include for each person covered by the invoice the following, individually listed per person: name, hours worked, hourly labor rate, invoice amount.
- B) The TO Contractor(s) shall email the original of each invoice and signed DPAF (Attachment 9), for each deliverable being invoiced to the Department of Health and Mental Hygiene at email address: Phil.Hemler@maryland.gov, with a copy to the TO Manager.
- C) Invoices for final payment shall be clearly marked as “FINAL” and submitted when all work requirements have been completed and no further charges are to be incurred under the TO Agreement. In no event shall any invoice be submitted later than 60 calendar days from the TO Agreement termination date.

2.11.3 WORK ORDER PROCESS

THIS SECTION IS NOT APPLICABLE TO THIS TORFP.

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SECTION 3 - TASK ORDER PROPOSAL FORMAT AND SUBMISSION REQUIREMENTS

3.1 REQUIRED RESPONSE

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

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

3.2 SUBMISSION

The TO Proposal shall be submitted via two emails, each not to exceed 25 MB.

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

- Subject line "CATS+ TORFP # M00B4400469 Technical" plus the Master Contractor Name
- One attachment labeled "TORFP M00B4400469 Technical - Attachments" containing all Technical Proposal Attachments (see Section 3.3 below), signed and in PDF format.
- One attachment labeled "TORFP M00B4400469 Technical – Proposal" in Microsoft Word format (2007 or later).

The TO Financial Proposal shall be contained in one email, with one attachment. This email shall include:

- Subject line "CATS+ TORFP # M00B4400469 Financial" plus the Master Contractor Name
- One attachment labeled "TORFP M00B4400469 Financial" containing the Financial Proposal contents, signed and in PDF format.

3.3 SUMMARY OF ATTACHMENTS

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

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

- 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

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

- Attachment 1 Price Proposal – Signed PDF

3.4 PROPOSAL FORMAT

A TO Proposal shall contain the following sections in order:

3.4.1 TO TECHNICAL PROPOSAL

A) Proposed Services

- 1) Executive Summary: A one-page summary describing the Master Contractor's understanding of the TORFP scope of work (Section 2) and proposed solution.
- 2) Assumptions: A description of any assumptions formed by the Master Contractor in developing the Technical Proposal. Master Contractors should avoid assumptions that counter or constitute exceptions to TORFP terms and conditions.

B) Compliance with Offeror's Company Minimum Qualifications

- 1) Offerors will complete the following table to demonstrate compliance with the Offeror's Company Minimum Requirements in Section 2.8.1.

Reference	Offeror Company Minimum Requirement	Evidence of Compliance
2.8.1.1	Company's demonstrated two (2) years of experience providing Information Technology development support services to U.S. based commercial or government entities with at least 2,000 end-users with at least one (1) engagement having lasted at least one year.	Offeror documents evidence of compliance here.

C) Proposed Personnel and TORFP Staffing

Master Contractors shall propose exactly one (1) resource per position.

- 1) Complete and provide Attachment 5 – Labor Classification Personnel Resume Summary for each proposed resource (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.
- 2) Provide evidence proposed personnel possess the required certifications in accordance with Section 2.8.2 Offeror's Personnel Minimum Qualifications.

- 3) Provide three (3) references per proposed personnel containing the information listed in Attachment, Form LC1 section A.
- 4) Provide the names and titles of the Master Contractor's management staff who will supervise the personnel and quality of services rendered under this TO Agreement.

D) MBE, SBE Participation and VSBE Participation

The Master Contractor(s) shall be a Small Business Enterprise (SBE) certified entity.

NO MBE or VSBE forms are required for this TORFP.

E) Subcontractors

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

F) Overall Master Contractor team organizational chart

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

G) Master Contractor and Subcontractor Experience and Capabilities

- 1) Provide up to three examples of engagements or contracts the Master Contractor has completed that were similar to Section 2 - Scope of Work. Include contact information for each client organization complete with the following:
 - a) Name of organization.
 - b) Point of contact name, title, email and telephone number (point of contact shall be accessible and knowledgeable regarding experience)
 - c) Services provided as they relate to Section 2 - Scope of Work.
 - d) Start and end dates for each example engagement or contract.
 - e) Current Master Contractor team personnel who participated on the engagement.
 - f) If the Master Contractor is no longer providing the services, explain why not.
- 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 1 above):

- a) Contract or task order name
- b) Name of organization.
- c) Point of contact name, title, email, 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 Section 2 above as engagement or contract experience. State of Maryland experience is neither required nor given more weight in proposal evaluations.

H) State Assistance

Provide an estimate of expectation concerning participation by State personnel.

I) Confidentiality

A Master Contractor should give specific attention to the identification of those portions of its proposal that it considers confidential, proprietary commercial information or trade secrets, and provide justification why such materials, upon request, should not be disclosed by the State under the Public Information Act, Title 10, Subtitle 6, of the State Government Article of the Annotated Code of Maryland. Contractors are advised that, upon request for this information from a third party, the TO Procurement Officer will be required to make an independent determination regarding whether the information may be disclosed.

3.4.2 TO FINANCIAL PROPOSAL

- A) A description of any assumptions on which the Master Contractor's TO Financial Proposal is based (Assumptions shall not constitute conditions, contingencies, or exceptions to the price proposal);
- B) Attachment 1– Price Proposal, completed in .PDF format with all proposed labor categories including all rates fully loaded. Master Contractors shall list all proposed resources by approved CATS+ labor categories in the price proposal. Prices shall be valid for 120 days.
- C) To be responsive to this TORFP, the Price Proposal (Attachment 1) shall provide labor rates for all labor categories. Proposed rates are not to 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.

Note: Failure to specify a CATS+ labor category in the completed Price Proposal for each proposed resource will make the TO proposal non-responsive to this TORFP.

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SECTION 4 - TASK ORDER AWARD PROCESS

4.1 OVERVIEW

The TO Contractor(s) will be selected from among all eligible Master Contractors within the appropriate Functional Area responding to the CATS+ TORFP. In making the TO Agreement award determination, the Department of Health and Mental Hygiene will consider all information submitted in accordance with Section 3.

4.2 TO PROPOSAL EVALUATION CRITERIA

The following are technical criteria for evaluating a TO Proposal in descending order of importance. If a Master Contractor proposes a candidate for each position, each candidate will be independently evaluated of the other candidate based on the technical criteria below. Failure to meet the minimum company personnel qualifications shall disqualify a proposal:

- A) The capability of the proposed resources to perform the required tasks and produce the required deliverables in the TORFP Scope of Work – Section 2. Capability will be determined from each proposed individual's resume, reference checks, and oral presentation (See Section 1.5 Oral Presentations/Interviews). The overall experience, capability and references for the Master Contractor as described in the Master Contractor's TO Technical Proposal.
- B) The Master Contractor's overall understanding of the TORFP Scope of Work – Section 2. Level of understanding will be determined by the quality and accuracy of the technical proposal in adherence to Section 3.4.
- C) The ability for the Master Contractor to meet staffing expectations relative to supplying additional personnel for this TORFP meeting qualifications in Section 2.8.
- D) Demonstration of how the Master Contractor plans to staff the task order at the levels set forth in Section 2.1 and also for potential future resource requests.

4.3 SELECTION PROCEDURES

- A) TO Proposals will be assessed throughout the evaluation process for compliance with the minimum qualifications listed in Section 2 of this TORFP, and quality of responses to Section 3.4.1 TO Technical Proposal.
- B) Interviews will be performed for proposed personnel from all TO Proposals deemed technically qualified. As described in Section 1.5, in the event that more than 10 responsive proposals are received, the Procurement Officer may perform a down select. The TO Procurement Officer will notify the Offeror at time of scheduling initial interviews whether subsequent rounds of interviews are required. When used, the down select procedures to be followed by the TO Procurement Officer are as follows:
 - a) An initial interview will be performed for all proposed personnel for TO Proposals meeting minimum requirements.

- b) A technical ranking will be performed for all TO Proposals based on initial interviews. TO Proposals will be ranked from highest to lowest for technical merit based on the quality of the proposals submitted and interview results.
 - c) Personnel from the top three (3) TO Proposals by technical ranking for each position will be notified of additional interviews.
 - d) If a Master Contractor proposes a candidate for each position, each candidate will be independently evaluated of the other position for the purposes of this section.
- C) For TO Proposals deemed technically qualified, the associated TO Financial Proposal will be opened. All others will be deemed not reasonably susceptible for award and the TO Procurement Officer will notify the Master Contractor it has not been selected to perform the work.
- D) Qualified TO Financial Proposal responses will be reviewed and ranked from lowest to highest price proposed.
- E) The most advantageous TO Proposal(s) considering both the technical and financial submissions shall be selected for TO award. In making this selection, technical merit has greater weight. The Department reserves the right in its discretion to make a single award to a TO Contractor for both positions or to make awards to two different TO Contractors, with each TO Contractor awarded one position.
- F) All Master Contractors submitting a TO Proposal shall receive written notice from the TO Procurement Officer identifying the awardee.

4.4 COMMENCEMENT OF WORK UNDER A TO AGREEMENT

Commencement of work in response to a TO Agreement shall be initiated only upon issuance of a fully executed TO Agreement, a Non-Disclosure Agreement (TO Contractor), a Purchase Order, and by a Notice to Proceed authorized by the TO Procurement Officer. See Attachment 7 - Notice to Proceed (sample).

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