

**Request for Resume (RFR) for Project Manager
CATS+ Master Contract
All Master Contract Provisions Apply**

Section 1 – General Information			
RFR Number: (Reference BPO Number)	M00B7400425		
Functional Area (Enter One Only)	Functional Area 10 - IT Management Consulting Services		
Labor Category/s			
<p><i>A single support staff or support groups of up to five members may be engaged for up to six months without renewal options. Agencies must pursue a concurrent procurement for any positions that may last longer than 6 months, other than the position of MITDP Project Manager. Awards for Major IT Development Project (MITDP)/Program Manager/Deputy PMs may have tenure of one base year with up to two optional years, or through the end of the project within the Master Contract term. An RFR is limited to only labor categories defined in the CATS+ RFP.</i></p>			
Enter the labor category/s to be provided:			
1. Project Manager			
Anticipated Start Date	December 15, 2016		
Duration of Assignment	1 year with two (2) one-year options		
Designated Small Business Reserve?(SBR): (Enter "Yes" or "No")	Yes		
MBE Goal, if applicable			% 0
Issue Date: mm/dd/yyyy	November 15, 2016	Due Date: mm/dd/yyyy	December 6, 2016
		Time (EST): 00:00 am/pm	12:00 pm Local Time
Place of Performance:	Department of Health and Mental Hygiene (DHMH) Office of Information Technology - Applications Division 201 W. Preston St. Baltimore, MD 21201		
Special Instructions: (e.g. interview information, attachments, etc.)	<p>Interviews, which are a type of oral presentation, will be performed in person, for all Offerors meeting minimum qualifications. At the Procurement Officer's discretion, an interview via the web, e.g., Skype, GotoMeeting, WebEx, may be held in lieu of an in-person meeting. All candidates shall be interviewed in substantially the same manner. The Procurement Officer shall, for each round of interviews, determine whether phone or in-person interviews will be utilized.</p> <p>In person interviews will take place at the Place of Performance location.</p> <p>In the event that more than ten (10) qualified proposals are received, the TO Procurement Officer may elect to follow a down-select process as follows:</p> <ol style="list-style-type: none"> a. An initial interview will be performed for all proposals meeting minimum requirements. b. A technical ranking will be performed for all proposals based on the initial 		

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	<p>interview. Proposals will be ranked from highest to lowest for technical merit based on the quality of the proposals submitted and interview/oral presentation results.</p> <p>The top ten (10) proposals identified by the technical ranking will be notified of additional interviews. All other Offerors will be notified of non-selection for this TORFP.</p>
Security Requirements (if applicable):	Candidates will be issued a temporary ID badge after showing proof of identification. (e.g., driver's license)

Invoicing Instructions	
<ol style="list-style-type: none"> 1. After the end of each month, the Master Contractor shall submit timesheets (for hourly invoicing) and activity reports (for both hourly and annual invoicing) to the Agency Task Order Manager (TO Manager) for review prior to submitting an invoice. 2. The TO Manager shall review, sign, and return to the Master Contractor the timesheets (for hourly invoicing) or the activity reports (for annual invoicing). 3. The Master Contractor shall send a copy of the signed timesheets or activity reports with an invoice to the Agency TO Manager, who is Phil Hemler. 4. The Master Contractor shall invoice as follows: <ol style="list-style-type: none"> a. Annual Labor Rate: Task Orders awarded at the Annual Labor Rate shall be invoiced monthly for 1/12 the Annual Labor Rate. b. Hourly Labor Rate: Task Orders awarded at the Hourly Labor Rate shall be invoiced monthly for actual hours x Labor Rate. 	

Special Invoicing Instructions:	None
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Section 2 – Agency Procurement Officer (PO) Information

Agency / Division Name:	Department of Health and Mental Hygiene (DHMH) / Office of Procurement and Support Services (OPASS)		
Agency PO Name:	<i>Alayna Mande Charland</i>	Agency PO Phone Number:	<i>410-767-5190</i>
Agency PO Email Address:	<i>Alayna.Charland@maryland.gov</i>	Agency PO Fax:	<i>410-333-5958</i>
Agency PO Mailing Address:	<i>DHMH-OPASS, 201 W Preston Street, RM 416, Baltimore, MD 21201</i>		

Section 3 – Scope of Work

Agency / Project Background

The objective of this RFR is to obtain one (1) qualified project manager (PM) to plan, coordinate, and lead the development of a strategy, design, justification, and proposal for an Electronic Health/Medical Record (EHR) system for State agencies that operate facilities delivering healthcare services. Foremost among these agencies are the Department of Health and Mental Hygiene (DHMH) and the Department of Public Safety and Corrections (DPSCS). The PM will lead a team composed of representatives from these two agencies and chaired by the CIOs of these two agencies. The team will be augmented with an EHR subject matter expert (SME) to be secured under a separate RFR procurement. The PM will need to demonstrate experience and apply skills in solution design as well as project management.

The Maryland Department of Health & Mental Hygiene, (DHMH), Office of Information Technology (OIT), will lead this effort and is issuing this RFR to obtain PM services for the new statewide EHR system. The EHR system will eventually require the issuance of a separate Request for Proposals (RFP) for a commercial off-the-shelf (COTS) hospital management information system to support twelve (12) facilities operated by DHMH in Maryland plus those operated by DPSCS.

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The mission of DHMH is to protect the public’s health. For which, DHMH administers public health programs that include operation of the aforementioned facilities for mental health, developmental disability and chronic/long term care. These facilities are located throughout the state and have populations ranging from approximately 20 to 400 with an aggregate population of approximately 2,000 individuals. Staff at the facilities who would be users of the new system when fully implemented could exceed 3,500 persons, including more than 2,700 in direct care positions (doctors, nurses, therapists, etc.).

DHMH currently operates a legacy Hospital Management Information System (HMIS) consisting of census and billing modules serving all twelve facilities and a pharmacy module in use at seven (7) psychiatric facilities. The EHR system envisioned to replace the legacy HMIS will consist of at least the following five modules: 1) Census, 2) Billing, 3) Pharmacy, 4) Electronic Medical Record (EMR), and 5) Computerized Provider Order Entry (CPOE).

The project under this RFR will define requirements, identify vendors, develop a justification ("business case"), and draft an RFP document for replacing the legacy hospital-management systems at DHMH, DPSCS, and potentially other agencies.

Job Description/s	
Labor Category/s (From Section 1 Above)	Duties / Responsibilities
1. Project Manager (PM)	<p>The PM will:</p> <ul style="list-style-type: none"> a. Work with Subject Matter Experts (SMEs) to conduct an analysis of the existing hospital-management systems (e.g., HMIS at DHMH); b. Work with SMEs to identify, refine, and prioritize both functional and non-functional requirements gathered from DHMH and DPSCS for a modern commercial off-the-shelf (COTS) EHR system; c. Develop personae (e.g., end user profiles), use cases, and workflows to demonstrate the context for requirements; d. Document potential benefits from a modern EHR system, quantifying the value as practicable and emphasizing opportunities for improvement to the quality of care delivered in State facilities; e. Engage and survey other public-sector institutions both within and outside Maryland that have implemented a modern EHR system; f. Conduct a Request for Information (RFI) process with qualified EHR vendors identified in the marketplace through reasonable due diligence; g. Develop the candidate solution architecture(s) for meeting the requirements of DHMH, DPSCS and any other agencies enlisted in this project. The architecture(s) may consist of solutions or services from more than one vendor in the marketplace; h. Develop budgetary estimates of the one-time and on-going costs expected to be incurred in migrating from legacy systems to a modern EHR system; i. Summarize the costs and benefits, and which costs and benefits may be both quantified and un-quantified, into a report to justify potential investment in and migration to a modern EHR system for State agencies that operate hospital facilities; j. Draft an RFP document identifying mandatory requirements, deliverables, and milestones for implementing a modern EHR system; k. Perform routine PM responsibilities for the successful planning and delivery of the

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	<p>foregoing;</p> <ul style="list-style-type: none"> i. Communicate and coordinate across State agencies and stakeholders as required; and m. Respond to requests from the project executive sponsors, who are the CIOs of DHMH and DPSCS, as requested in relation to the deliverables and activities for this project. <p>The PM will be located primarily at the DHMH headquarters, as identified in Section 1, and will visit State facilities as appropriate.</p> <p>Specific deliverables are identified in Attachment 3 (below). Specific services will include those identified in Attachment 3 (below). The PM must demonstrate past experience with System Development Life Cycle (SDLC) methods and deliverables, preferably including Agile techniques.</p> <p><i>See Attachment 3 for a detailed description of duties, responsibilities and deliverables.</i></p>
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Minimum Qualifications

For minimum qualifications, see the labor category description in the CATS+ RFP for the subject RFR labor category. In addition, qualified candidates must meet the minimum qualifications specified below. **Candidates that do not meet minimum qualifications will be deemed not reasonably susceptible for award and will not progress to evaluation.**

Labor Category/s (From Section 1 Above)	Minimum Qualifications
1. Project Manager	<ul style="list-style-type: none"> a. Education: <ul style="list-style-type: none"> 1. Bachelor’s Degree from an accredited college or university. b. General Experience: <ul style="list-style-type: none"> 1. At least five (5) years of experience in project management, of which three (3) years of experience in project management for IT solutions. 2. At least three (3) years of experience in IT solution design (for example, as a Business Analyst). 3. At least two (2) years of experience in estimating costs and preparing investment justifications. 4. At least two (2) years of experience in either drafting or responding to RFPs for IT solutions that include software and related services. c. Specialized Experience: <ul style="list-style-type: none"> 1. At least five (5) years of experience in managing IT related projects with demonstrated leadership of at least three (3) successful projects that were delivered on time and on budget. 2. Demonstrated leadership of design of at least three (3) IT solutions. 3. Demonstrated experience at engaging with solution stakeholders and leading solution design. 4. Demonstrated experience preparing written documents and presentations.

Preferred Qualifications

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The additional Experience/Knowledge/Skills listed below are preferred by the State.

Labor Category/s	Preferred Qualifications
1. Project Manager	<p>a. Education:</p> <ol style="list-style-type: none"> 1. Preferred to have Master's degree or PMI certification, or equivalent, as determined by the PO. <p>b. General Experience:</p> <ol style="list-style-type: none"> 1. Preferred to have eight (8) years total experience in roles for which the primary responsibilities were leadership positions in solution design and project management. 2. Preferred to have past experience conducting marketplace research on capabilities of COTS packages. 3. Preferred to have experience in technical development and technical architecture. 4. Preferred to have experience in delivery of solutions for healthcare services, including EHR systems. 5. Preferred to have experience in leading the justification, evaluation, and selection of COTS solutions, including the drafting and distribution of RFIs and RFPs.

Section 4 - Required Submissions

NOTE:

1. Master Contractors may propose only one candidate for each position requested.
2. Master Contractors electing not to propose in response to the RFR must submit a "Master Contractor Feedback Form" via the "Master Contractor Login" on the CATS+ web site.
3. Master Contractors proposing in response to the RFR must submit the documents below as separate files contained in two separate emails as follows:

Email 1 of 2 with "Technical": Master Contractor Name, RFR number, & candidate name in the subject line

1. Resume for each labor category described in the RFR (Attachment 1)
2. Three (3) current references that can be contacted for performance verification of the submitted candidate's work experience and skills. Telephone number and email address of reference is needed.
3. Conflict of Interest Affidavit (Attachment G in the CATS+ RFP)
4. Living Wage Affidavit (Attachment I in the CATS+ RFP)
5. Certification Regarding Investments in Iran (Attachment 4 of this RFR)
6. Any other required documentation to demonstrate meeting minimum qualifications.

Email 2 of 2 as a password protected file with "Financial": Master Contractor Name, RFR number, & candidate name in the subject line. The password must be unique for each candidate e-mail.

1. Price Proposal (Attachment 2)

The PO will contact Master Contractors to obtain the password to the financial proposal for those candidates that are deemed reasonably susceptible for award. Master Contractors who cannot provide a password that opens the file will be considered not susceptible for award. Subsequent submissions of financial content will not be allowed.

Section 5 – Evaluation Criteria

Candidates meeting the Minimum Qualifications listed in Section 3 above will be evaluated for overall best value, as follows:

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| 1. The overall experience, capability and references for the proposed candidate, as described in the Master Contractor’s RFR Technical Proposal. |
| 2. Interview |
| 3. Preferred Qualifications |
| 4. Price |

Basis for Award Recommendation

The Agency PO will recommend award to the Master Contractor whose proposal is determined to be the most advantageous to the State, considering price and the evaluation factors set forth in the RFR. In this evaluation technical merit is considered to have greater weight. The Agency PO will initiate and deliver a Task Order Agreement to the selected Master Contractor.

Master Contractors should be aware that if selected, State law regarding conflict of interest may prevent future participation in procurements related to the RFR Scope of Work, depending upon specific circumstances.

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**ATTACHMENT 1
RFR RESUME FORM
RFR # M00B7400425**

Instructions: Enter resume information in the fields below; do not submit other resume formats. Submit only one resume per Labor Category described in Section 1 of the RFR. If the RFR requests multiple Labor Categories, use a separate resume form for each Labor Category.

Labor Category **Project Manager**
(from Section 1 of the RFR)

Candidate Name:

Master Contractor:

A. Education / Training

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

B. Relevant Work Experience

Describe work experience relevant to the Duties / Responsibilities and Minimum Experience / Knowledge / Skill described in Section 3 of the RFR. Starts with the most recent experience first; do not include non-relevant experience.

[Organization] *Description of Work...*
[Title / Role]
[Period of Employment / Work]
[Location]
[Contact Person (Optional if current employer)]

[Organization] *Description of Work...*
[Title / Role]
[Period of Employment / Work]
[Location]

<add lines as needed>

C. Employment History

List employment history, starting with the most recent employment first

Start and End Dates	Job Title or Position	Organization Name	Reason for Leaving
<add lines as needed>			

D. References

List persons the State may contact as employment references

Reference Name	Job Title or Position	Organization Name	Telephone / Email
<add lines as needed>			

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<add lines as needed>			
LABOR CATEGORY PERSONNEL RESUME SUMMARY (ATTACHMENT 1 CONTINUED) *"Candidate Relevant Experience" section must be filled out. Do not enter "see resume" as a response.			
Proposed Individual's Name/Company:		How does the proposed individual meet each requirement?	
LABOR CATEGORY TITLE – PROJECT MANAGER (SENIOR)			
Requirement		Candidate Relevant Experience *	
Education: 1. Bachelor's Degree from an accredited college or university.		Education: 1.	
General Experience: 1. At least five (5) years of experience in project management, of which three (3) years of experience in project management for IT solutions. 2. At least three (3) years of experience in IT solution design (for example, as a Business Analyst). 3. At least two (2) years of experience in estimating costs and preparing investment justifications. 4. At least two (2) years of experience in either drafting or responding to RFPs for IT solutions that include software and related services.		General Experience: 1.	
Specialized Experience: 1. At least five (5) years of experience in managing IT related projects with demonstrated leadership of at least three (3) successful projects that were delivered on time and on budget. 2. Demonstrated leadership of design of at least three (3) IT solutions. 3. Demonstrated experience at engaging with solution stakeholders and leading solution design. 4. Demonstrated experience preparing written documents and presentations.		Specialized Experience: 1.	
Preferred Experience: 1. Preferred to have Master's degree or PMI certification, or equivalent, as determined by the PO. 2. Preferred to have eight (8) years total experience in roles for which the primary responsibilities were leadership positions in solution design and project management. 3. Preferred to have past experience conducting marketplace research on capabilities of COTS packages. 4. Preferred to have experience in technical development and technical architecture.			

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**ATTACHMENT 2
PRICE PROPOSAL
RFR # M00B7400425**

(This form is to be filled out by Master Contractors - Submit as the Financial Response with password protection)

CATS+ Labor Category	A	B	C	D
	Fully Loaded Annual Labor Rate*	Fully Loaded Hourly Labor Rate	Evaluation Hours	Extended Price (B x C)
Project Manager (Base Period 1 year)	\$	\$	1800	\$
Option Year 1	\$	\$	1800	
Option Year 2	\$	\$	1800	
(Base Period+ Options Year 1 + Option Year 2) Total RFR Price:				\$

Authorized Individual Name	Company Name
Title	Company Tax ID #
Signature	Date

*The Agency reserves the right to award each individual position at either the proposed Annual Labor Rate or proposed Hourly Labor Rate. The Annual Labor Rate requires a minimum of 1920 hours worked annually. The Hourly Labor Rate cannot exceed the Master Contract rate, but may be lower. Both rates must be fully loaded, all inclusive, and shall include all direct and indirect costs for the Master Contractor to perform under the TOA. Evaluation Hours are for evaluation purposes only and do not represent actual hours to be worked or invoiced.

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ATTACHMENT 3 RFR # M00B7400425 PROJECT MANAGER (PM) DUTIES & RESPONSIBILITIES	
1. ROLE DEFINITIONS The purpose of this section is to distinguish among the roles interacting with the PM obtained through this RFR.	
A.	Task Order (TO) Procurement Officer – State staff person responsible for managing the RFR process up to the point of TO award.
B.	TO Manager – State staff person who oversees the SPM’s work performance and administers the TO once it is awarded.
C.	TO Contractor – The CATS+ Master Contractor awarded a TO as a result of this RFR. The TO Contractor shall provide the SPM resource and be accountable for SPM work performance under the TO.
D.	Project Manager (PM) – The person provided by the TO Contractor as a result of this RFR. The PM is responsible for overall project planning and execution. The PM is responsible for performing the duties and responsibilities described in Attachment 3, and for completing all assigned tasks and deliverables under the TO.
E.	Other Project Contractors – The Contractors responsible for project implementation, including their PM and other personnel assigned to the project. The Contractors report to the PM for project purposes with oversight by the TO Manager.
2. PROJECT MANAGER DUTIES AND RESPONSIBILITIES	
<p>The PM shall oversee and direct the project teams comprised of current State and contractual personnel. Responsibilities include overall project governance and direction, technical architecture, and risk management as needed. Duties shall focus on project monitoring, project execution, project control, team integration, change integration, and corrective action as needed. The position shall ensure the application of PMI and State SDLC standards in managing the project.</p> <p>The PM shall be accountable for the creation of any and all written deliverables that do not exist for the project, and for the updating of those that do exist. The PM shall ensure that all deliverables are consistent with standards in the Project Management Institute (PMI) Project Management Body of Knowledge (PMBOK) and State of Maryland System Development Life Cycle (SDLC) (see Section 3 below).</p> <p>The State reserves the right to amend, with PM recommendations and input, the deliverables furnished on this project to correspond to an agile methodology.</p>	
PM Project Management Duties	
An asterisk (*) by the section number below and bold italics identifies a deliverable associated with the duty / responsibility. Refer to Section 7 for full descriptions of all deliverables and time of performance.	
2.1	1. Become thoroughly knowledgeable on all aspects of the Project.
2.2	Engage in an accelerated "discovery" process to become familiar with existing analyses, past procurements, organizational structures, and procurement processes.
2.3 *	Develop the project deliverables and maintain project reports that are described in Section 6 by

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	engaging stakeholders, going through iterations, and responding to requests from the Executive Sponsors.
2.4	Perform site visits to build relationships and develop understanding of requirements.
2.5	Collaborate effectively with all project stakeholders and sponsors, including the EHR SME to be secured via a separate RFR procurement.
2.6	Escalate issues expeditiously and appropriately.
2.7	Conduct all meetings and workshops with advance preparation and due professionalism.
2.8	Demonstrate clarity and brevity in all written communications, deliverables, and reports.
2.9 *	Demonstrate accountability and ownership for successful development of a quality RFP for a statewide EHR solution.
2.10 *	Adhere to guidelines, procedures, and requirements relating to State procurements and ethics.
3. REQUIRED PROJECT POLICIES, GUIDELINES AND METHODOLOGIES	
<p>The PM shall keep informed of and comply with all applicable laws, regulations, policies, standards and guidelines affecting information technology projects applicable to activities and obligations under the TO Agreement, as those laws, policies, standards and guidelines may be amended from time to time. The PM shall adhere to and remain abreast of current, new, and revised laws, regulations, policies, standards and guidelines affecting project execution and it shall obtain and maintain, at its expense, all licenses, permits, insurance, and governmental approvals, if any, necessary to the performance of its obligations under the TO Agreement. These may include, but are not limited to:</p>	
A.	The nine project management knowledge areas in the PMI's PMBOK.
B.	The State's SDLC methodology at: www.doit.maryland.gov - keyword: SDLC.
C.	The State's IT Security Policy and Standards at: www.DoIT.maryland.gov - keyword: Security Policy.
D.	The State's IT Project Oversight at: www.DoIT.maryland.gov - keyword: IT Project Oversight.
4. SUBSTITUTION OF PERSONNEL	
A.	<p><u>DIRECTED PERSONNEL REPLACEMENT</u></p> <p>A. The TO Manager may direct the Master Contractor to replace any contractor personnel who, in the sole discretion of the TO Manager, are perceived as being unqualified, non-productive, unable to fully perform the job duties, disruptive, or known, or reasonably believed, to have committed a major infraction(s) of law or Department, Contract, or RFR requirement.</p> <p>B. If deemed appropriate in the discretion of the TO Manager, the TO Manager shall give written notice of any personnel performance issues to the Master Contractor, describing the problem and delineating the remediation requirement(s). The Master Contractor shall provide a written Remediation Plan within three (3) days of the date of the notice. If the TO Manager rejects the Remediation Plan, the Master Contractor shall revise and resubmit the plan to the TO Manager within five (5) days of the rejection, or in the timeframe set forth by the TO Manager in writing. Once a Remediation Plan has been accepted in writing by the TO Manager, the Master Contractor shall immediately implement the Remediation Plan.</p> <p>C. Should performance issues persist despite the approved Remediation Plan, the TO Manager will give written notice of the continuing performance issues and either request a new Remediation Plan within a specified time limit or direct the removal and replacement of the contractor personnel whose performance is at issue. A request for a new Remediation Plan will follow the procedure described in Paragraph B.</p> <p>D. In circumstances of directed removal, the Master Contractor shall provide a suitable replacement for TO Manager approval within fifteen (15) days of date of the notification of directed removal, or the actual removal, whichever occurs first. However, if the TO Manager determines that the State's best interests</p>

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	<p>require removal of the contractor personnel with less than fifteen (15) days' notice, the TO Manager can direct removal in shorter timeframe, including immediate removal.</p> <p>E. Normally, a directed personnel replacement will occur only after prior notification of problems with requested remediation, as described above. However, the TO Manager reserves the right to direct immediate personnel replacement without utilizing the remediation procedure described above.</p> <p>F. Replacement or substitution of contractor personnel under this section shall be in addition to, and not in lieu of, the State's remedies under the RFR or which otherwise may be available at law or in equity.</p>		
B.	<p><u>SUBSTITUTION OF PERSONNEL PRIOR TO RFR EXECUTION (AND UP TO 30 DAYS AFTER RFR EXECUTION)</u></p> <p>Prior to Task Order Execution or within thirty (30) days after Task Order Execution, the Offeror may substitute proposed candidate only under the following circumstances: vacancy occurs due to the sudden termination, resignation, or approved leave of absence due to an Extraordinary Personnel Event, or death of such personnel. To qualify for such substitution, the Offeror must describe to the State's satisfaction the event necessitating substitution and must demonstrate that the originally proposed personnel are full-time employees with the Offeror (subcontractors, temporary staff or 1099 contractors do not qualify). Proposed substitutions shall be of equal caliber or higher, in the State's sole discretion. Proposed substitutes deemed by the State to be less qualified than the originally proposed individual may be grounds for pre-award disqualification or post-award termination.</p> <p>An Extraordinary Personnel Event – means Leave under the Family Medical Leave Act; an incapacitating injury or incapacitating illness; or other circumstances that in the sole discretion of the State warrant an extended leave of absence, such as extended jury duty or extended military service.</p>		
C.	<p><u>SUBSTITUTION AFTER 30 DAYS POST RFR EXECUTION</u></p> <p>The procedure for substituting personnel after RFR execution is as follows:</p> <ol style="list-style-type: none"> 1. The Master Contractor may not substitute personnel without the prior approval of the Agency TO Manager. 2. To replace any personnel, the Master Contractor shall submit resumes of the proposed individual specifying the intended approved labor category. Any proposed substitute personnel shall have qualifications equal to or better than those of the replaced personnel. 3. Proposed substitute individual shall be approved by the Agency TO Manager. The Agency TO Manager shall have the option to interview the proposed substitute personnel and may require that such interviews be in person. After the interview, the Agency TO Manager shall notify the Master Contractor of acceptance or denial of the requested substitution. If no acceptable substitute personnel is proposed within the time frame established by the Agency TO Manager, the TO Agreement may be cancelled. 		
5. WORK HOURS			
A.	The PM will work an eight-hour day between the hours of 7:00 AM and 6:00 PM, Monday through Friday except for State holidays and Service Reduction days or other office closures, or an alternate work schedule with prior approval of the Agency TO Manager.		
B.	Alternatively, at the sole discretion of the TO Manger, the PM may follow DoIT's compressed work week schedule.		
C.	Duties also may require some evening and/or weekend hours billed on actual time worked at the proposed hourly rate.		
6. PROJECT MANAGER DELIVERABLES AND TIME OF PERFORMANCE			
<i>Note – for each of the written deliverables below, ongoing quality will be a factor in the Monthly Performance Rating described in Section 4 above.</i>			
ID #	Deliverable	Acceptance Criteria	Time of

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	Description		Performance
6.1	Project Charter	MS Word document (or mutually agreed upon document) that defines the scope, objectives, and participants in the project. It shall provide a preliminary delineation of roles and responsibilities, outline the project objectives, identify the main stakeholders, and define the authority of the PM.	
6.2	Project Management Plan	<p>MS Word document (or mutually agreed upon document) that defines how the project will be executed, monitored and controlled. The document will be developed with input from the project team and key stakeholders and should include:</p> <ul style="list-style-type: none"> a. Introduction and Project Background b. Project Overview c. Project Organization and Responsibilities d. Project Description, Schedule and Resources (including identification of areas that lack necessary resources) e. Preliminary Risk Assessment and Mitigation Strategies f. Project Acquisition Plan g. Project Communication Plan h. Project Success and Evaluation Criteria <p>The Project Management Plan shall comply with Maryland’s SDLC.</p>	Update frequency will be determined by the TO Manager after award.
6.3	Master Schedule	<p>MS Project document (or mutually agreed upon document) that is suitable for tracking project activities. At a minimum, the Master Schedule shall show:</p> <ul style="list-style-type: none"> a. Dates and Status for Project Deliverables and Milestones b. High-Level Work Streams and Activities c. Estimates of Resources Actually Consumed and Estimated for Completion <p>This is a single, base-lined and periodically updated deliverable encompassing all project activities. The Integrated Master Schedule shall comply with Maryland’s SDLC.</p>	Update frequency will be determined by the TO Manager after award.
6.4	EHR Analyses, RFI, and RFP	<ul style="list-style-type: none"> a. Requirements Document: Collection, refinement, organization, assessment, reconciliation, and prioritization of functional and non-functional requirements for behavioral and clinical EHR within DHMH, DPSCS, and other designated agencies, if any. b. Stakeholders and Personae Analysis: Definition of key stakeholder groups and end-user personae for a modern EHR system. c. Use Case and Workflow Diagrams: Development of use cases and workflow diagrams to promote the definition and understanding of system and non-system requirements. 	

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		<p>d. RFI Document: Preparation and distribution of an RFI document in accordance with approved templates and procedures relating to State procurements.</p> <p>e. RFI Findings Document: Organization of the results of the RFI process, including the results of marketplace research, into a single document that includes an executive summary. This document shall not contain recommendations regarding particular vendor solutions.</p> <p>f. Candidate Solution Architecture Document: Description and depiction of the applications and technologies that compose a candidate solution architecture for meeting the captured and documented requirements.</p> <p>g. EHR Justification Document: A description of cost drivers and value drivers for a modern EHR system, with quantification of costs and benefits as practicable.</p> <p>h. Draft RFP Document: Draft of RFP document(s) to serve as basis of procurement(s) to realize the candidate solution architecture, using approved State templates.</p>	
6.5	<i>Project Reports / Other Documentation</i>	<p>MS Word document (or mutually agreed upon document) that captures and tracks ongoing project activities and status. The report will capture activities completed in the past reporting period, activities planned for the following reporting period, the completion status of project deliverables and status of Project costs (planned vs. actual). The report will describe issues identified on the project and the status of efforts to resolve issues and mitigate risks.</p> <p>The report will detail:</p> <ul style="list-style-type: none"> a. Bi-Weekly Project Status Reports to the EHR Program Office and Executive Sponsors. b. Deliverable Acceptance Documents. c. Other Documents (as reasonably requested by the Executive Sponsors) 	Update frequency will be determined by the TO Manager after award.

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ATTACHMENT 4 - CERTIFICATION REGARDING INVESTMENTS IN IRAN

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

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

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

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

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

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

CERTIFICATION REGARDING INVESTMENTS IN IRAN

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

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

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

Name of Authorized Representative: _____

Signature of Authorized Representative: _____

Date: _____ Title: _____

Witness Name (Typed or Printed): _____

Witness Signature and Date: _____