



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

Maryland Accountability and Reporting System (MARS)

System Operation and Maintenance Support

CATS+ TORFP #R00B4400006

**Maryland State Department of Education (MSDE)
Office of Information Technology (OIT)
&
Division for School Effectiveness
Office of School and Community Nutrition Programs (OSCNP)**

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TABLE OF CONTENTS

SECTION 1 - ADMINISTRATIVE INFORMATION.....	6
1.1 RESPONSIBILITY FOR TORFP AND TO AGREEMENT	7
1.2 TO AGREEMENT	7
1.3 TO PROPOSAL SUBMISSIONS	7
1.4 ORAL PRESENTATIONS/INTERVIEWS.....	7
1.5 MINORITY BUSINESS ENTERPRISE (MBE).....	7
1.6 CONFLICT OF INTEREST	7
1.7 NON-DISCLOSURE AGREEMENT	8
1.8 LIMITATION OF LIABILITY CEILING	8
1.9 CONTRACT MANAGEMENT OVERSIGHT ACTIVITIES	8
1.10 QUESTIONS.....	8
1.11 TO PRE-PROPOSAL CONFERENCE.....	8
1.12 LIVING WAGE	9
1.13 CHANGE ORDERS.....	9
1.14 IRANIAN NON-INVESTMENT	9
SECTION 2 – SCOPE OF WORK	10
2.1 PURPOSE	10
2.2 REQUESTING AGENCY INFORMATION.....	10
2.3 MANAGEMENT ROLES AND RESPONSIBILITIES	11
2.4 SYSTEM BACKGROUND AND DESCRIPTION	11
2.4.1 MARS ENVIRONMENT	12
2.4.2 MARS INTERFACES.....	13
2.5 PROFESSIONAL DEVELOPMENT	13
2.6 REQUIREMENTS	13
2.6.1 WO PROCESSING	14
2.6.2 SUPPORT MARS ENVIRONMENTS.....	15
2.7 WORK ORDER PROCESS	16
2.8 TO CONTRACTOR PERSONNEL DUTIES AND RESPONSIBILITIES	17
2.8.1 ALL TO CONTRACTOR PERSONNEL RESPONSIBILITIES.....	17
2.8.2 IT PROFESSIONAL RESPONSIBILITIES.....	18
2.8.3 SOFTWARE ENGINEER RESPONSIBILITIES.....	18
2.8.4 WEB DEVELOPER RESPONSIBILITIES.....	18
2.8.5 TESTING SPECIALIST RESPONSIBILITIES.....	18
2.8.6 PROJECT MANAGER RESPONSIBILITIES.....	19
2.8.7 WEB DESIGNER RESPONSIBILITIES	19
2.8.8 INTEGRATION SPECIALIST RESPONSIBILITIES.....	20
2.8.9 DOCUMENTATION SPECIALIST RESPONSIBILITIES.....	20
2.8.10 TRANSITION PLAN.....	20
2.8.11 PROJECT MANAGEMENT PLAN	21
2.8.12 RECURRING DUTIES	21
2.8.13 SOFTWARE RELEASE MANAGEMENT	22
2.8.14 SERVICE LEVEL AGREEMENT	23
2.8.15 WORK HOURS.....	24
2.9 DELIVERABLES/ACCEPTANCE CRITERIA	24
2.10 PERFORMANCE EVALUATION.....	27
2.10.1 PERFORMANCE PROBLEMS MITIGATION	27
2.11 SUBSTITUTION OF PERSONNEL.....	27
2.12 HARDWARE, SOFTWARE, AND MATERIALS	27

2.13	REQUIRED POLICIES, GUIDELINES AND METHODOLOGIES	27
2.14	TO CONTRACTOR COMPANY MINIMUM QUALIFICATIONS	27
2.15	TO CONTRACTOR KEY PERSONNEL MINIMUM QUALIFICATIONS	28
2.15.1	PROJECT MANAGER (PMP) MINIMUM QUALIFICATIONS.....	28
2.15.2	INTEGRATION SPECIALIST MINIMUM QUALIFICATIONS	29
2.15.3	TESTING SPECIALIST MINIMUM QUALIFICATIONS	29
2.15.4	WEB DESIGNER MINIMUM QUALIFICATIONS.....	29
2.16	TO CONTRACTOR PERSONNEL MINIMUM QUALIFICATIONS	30
2.16.1	IT PROFESSIONAL MINIMUM QUALIFICATIONS	30
2.16.2	SOFTWARE ENGINEER MINIMUM QUALIFICATIONS	30
2.16.3	WEB DEVELOPER MINIMUM QUALIFICATIONS	31
2.16.4	DOCUMENTATION SPECIALIST MINIMUM QUALIFICATIONS	31
2.17	TO CONTRACTOR PERSONNEL PREFERRED EXPERTISE	31
2.17.1	IT PROFESSIONAL PREFERRED QUALIFICATIONS.....	32
2.17.2	SOFTWARE ENGINEER PREFERRED QUALIFICATIONS	32
2.17.3	WEB DEVELOPER PREFERRED QUALIFICATIONS.....	32
2.17.4	TESTING SPECIALIST PREFERRED QUALIFICATIONS.....	32
2.17.5	PROJECT MANAGER (PMP) PREFERRED QUALIFICATIONS	32
2.17.6	WEB DESIGNER PREFERRED QUALIFICATIONS	33
2.17.7	INTEGRATION SPECIALIST PREFERRED QUALIFICATIONS	33
2.17.8	DOCUMENTATION SPECIALIST PREFERRED QUALIFICATIONS	33
2.18	TO CONTRACTOR EXPERTISE REQUIRED	33
2.19	INVOICE SUBMISSION.....	33
2.19.1	INVOICE FORMAT	34
2.20	MBE PARTICIPATION REPORTS	34
SECTION 3 - TO PROPOSAL FORMAT AND SUBMISSION REQUIREMENTS.....		35
3.1	REQUIRED RESPONSE	35
3.2	FORMAT	35
3.2.1	TO Technical Proposal:	35
3.2.2	The financial response of the TO Proposal shall include:	38
SECTION 4 - PROCEDURE FOR AWARDING A TO AGREEMENT		39
4.1	EVALUATION CRITERIA	39
4.2	TECHNICAL CRITERIA	39
4.3	SELECTION PROCEDURES	39
4.4	COMMENCEMENT OF WORK UNDER A TO AGREEMENT.....	39
ATTACHMENT 1 - PRICE PROPOSAL		40
ATTACHMENT 2 – MINORITY BUSINESS ENTERPRISE FORMS		43
ATTACHMENT 3 - Task Order Agreement		56
ATTACHMENT 4 - Conflict Of Interest Affidavit And Disclosure		59
ATTACHMENT 5 - Labor Classification Personnel Resume Summary		60
ATTACHMENT 6 - Directions to the Pre-TO Proposal Conference		85
ATTACHMENT 7 - Non-Disclosure Agreement (Offeror)		86
ATTACHMENT 8 - NON-DISCLOSURE AGREEMENT (TO Contractor).....		87
EXHIBIT A		89
ATTACHMENT 9 – TO CONTRACTOR SELF-REPORTING CHECKLIST.....		90

ATTACHMENT 10 – living wage affidavit of Agreement92
ATTACHMENT 11 – NOTICE TO PROCEED93
ATTACHMENT 12 – AGENCY RECEIPT OF DELIVERABLE FORM.....94
ATTACHMENT 13 – AGENCY ACCEPTANCE OF DELIVERABLE FORM.....95
ATTACHMENT 14- PERFORMANCE EVALUATION FORM (PEF).....96
ATTACHMENT 15- WO Template97
ATTACHMENT 16 – CERTIFICATION REGARDING INVESTMENTS IN IRAN.....98

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 are invited to submit a Task Order (TO) Proposal to this TORFP. Master Contractors choosing not to submit a proposal shall submit a Master Contractor Feedback form. The form is accessible via your CATS+ Master Contractor login screen and clicking on TORFP Feedback Response Form from the menu. 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.

TORFP Name:	Maryland Accountability and Reporting Systems Operations and Maintenance
Functional Area:	Functional Area 5 – Software Engineering
TORFP Issue Date:	Friday, January 17, 2014
Closing Date and Time:	Wednesday, 03/12/2014 at 2:00 PM ET
Questions Due Date and Time:	Wednesday, 02/05/2014 no later than 2:00 PM ET
TORFP Requesting Agency:	Maryland State Department of Education Division for School Effectiveness Office of School and Community Nutrition Programs
Questions and Proposals are to be sent to:	Dorothy Richburg drichburg@msde.state.md.us
TO Procurement Officer	Dorothy Richburg Phone Number: 410-767-0628; Fax Number: 410 -333-2026
TO Manager:	Anthony Palcher Office Phone Number: 410-767-3689; Fax: 410-333-2635
Project Number:	R00B4400006
TO Type:	Time and Materials
Period of Performance:	One year with four (4) one-year renewal option years
MBE Goal:	25% with minimum sub-goals for Women-owned of 8 %, African American-owned of 7 % and Hispanic American-owned of 2 %
VSBE Goal:	0
Small Business Reserve (SBR):	No
Primary Place of Performance:	Unless the Work Order (WO) stipulates the TO Contractor shall be on site; otherwise, work shall be completed remotely at the TO Contractor location. Scheduled Meetings and Escalated onsite Activities shall take place at MSDE located at: 200 West Baltimore Street Baltimore, MD 21201
State Furnished Work Site and/or Access to Equipment, Facilities or Personnel:	Individual network access controls to source code and Test Environment.
TO Pre-Proposal Conference:	Maryland State Department of Education Nancy S. Grasmick Building 200 West Baltimore Street, 8 th Floor, CR 6 Baltimore, MD 21201 02/07/2014 at 10:00 A/M See Attachment 6 for Directions

MARYLAND ACCOUNTABILITY AND REPORTING SYSTEMS
OPERATIONS AND MAINTENANCE
TORFP R00B #4400006
PRE-PROPOSAL CONFERENCE INTENT TO ATTEND
Print or Type

NAME OF COMPANY:

ADDRESS OF COMPANY:

FAX NUMBER:

E-Mail ADDRESS:

MINORITY BUSINESS ENTERPRISE (MBE): YES _____ NO _____

EXPECTED NUMBER OF ATTENDEES:

NAME OF PRIMARY CONTACT FOR
PURPOSES OF SENDING INFORMATION:

If you are unable to attend the Pre-Proposal conference or submit a proposal, for this project please fill out the bottom portion of this letter and return to:

Maryland State Department of Education
Attention: Dorothy Richburg (email: drichburg@msde.state.md.us)
Procurement Section
200 West Baltimore Street
Baltimore, Maryland 21201

_____ I will _____ will not attend the pre-proposal conference

_____ I will _____ will not submit a proposal for this project. If not, please explain:

Too busy at this time

Not engaged in this type of work

Site location too distant

Project too large/small (circle one)

Other (specify)

Do you wish to receive solicitations for similar/other projects in the future? Yes _____ No

Signature Company Name

Date _____ Telephone No. _____

SECTION 1 - ADMINISTRATIVE INFORMATION

1.2 RESPONSIBILITY FOR TORFP AND TO AGREEMENT

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.

The TO Manager has the primary responsibility for the management of the work performed under the TO Agreement; administration functions, including issuing written directions; ensuring compliance with the terms and conditions of the CATS+ Master Contract; and, in conjunction with the selected Master Contractor, achieving on budget/on time/on target (e.g., within scope) completion of the Scope of Work.

1.3 TO AGREEMENT

Based upon an evaluation of TO Proposal responses, a Master Contractor 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, which will bind the selected Master Contractor (TO Contractor) to the contents of its TO Proposal, including the price 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 e-mail box. The TO Proposal is to be submitted via e-mail, not to exceed 5 MB, as two (2) attachments in MS Word format. The "subject" line in the e-mail submission shall state the TORFP #R00B4400006. The first file will be the TO Technical Proposal for this TORFP and titled, "CATS+ TORFP #R00B4400006 Technical". The second file will be the TO Financial Proposal for this CATS+ TORFP and titled, "CATS+ TORFP #R00B4400006 Financial". The following proposal documents must be submitted with required signatures as .PDF files with signatures clearly visible:

- Attachment 1 – Price Proposal
- Attachment 2 - MBE Forms D-1 and D-2
- Attachment 4 - Conflict of Interest Affidavit and Disclosure
- Attachment 10 – Living Wage Affidavit of Agreement
- Attachment 16 – Iranian Non-Investment

1.5 ORAL PRESENTATIONS/INTERVIEWS

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

1.6 MINORITY BUSINESS ENTERPRISE (MBE)

A Master Contractor that responds to this TORFP shall complete, sign, and submit all required MBE documentation (Attachment 2 - Forms D-1 and D-2) at the time it submits its TO Proposal. **Failure of the Master Contractor to complete, sign, and submit all required MBE documentation at the time it submits its TO Proposal will result in the State's rejection of the Master Contractor's TO Proposal.**

1.7 CONFLICT OF INTEREST

The TO Contractor awarded the TO Agreement shall provide IT consulting services for State agencies or component programs with those agencies, and must do so impartially and without any conflicts of interest. Each Master Contractor shall complete and include a Conflict of Interest Affidavit and Disclosure in the form included as

Attachment 4 this TORFP with its TO Proposal. 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 shall 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.

1.8 NON-DISCLOSURE AGREEMENT

Certain system documentation may be available for potential Offerors to review at a reading room. Offerors who review such documentation will be required to sign a Non-Disclosure Agreement (Offeror) in the form of Attachment 7. Please contact the TO Procurement Officer of this TORFP to schedule an appointment. In addition, certain 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 8.

1.9 LIMITATION OF LIABILITY CEILING

Pursuant to Section 27 (C) of the CATS+ Master Contract, the limitation of liability per claim under this TORFP shall not exceed the total TO Agreement amount.

1.10 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 CATS+ task orders (TO). This process shall typically apply to active TOs for operations, maintenance, and support valued at \$1 million or greater, but all CATS+ TOs are subject to review.

Attachment 9 is 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 shall complete and return the checklist as instructed on the checklist. Subsequently, at six month intervals from the due date on the initial checklist, the TO Contractor shall update and resend the checklist to DoIT.

1.11 QUESTIONS

All questions must be submitted via email to the 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.

1.12 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 interested 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 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 Procurement Officer no later than five (5) business days prior to the pre-proposal conference. The TO Requesting Agency will make reasonable efforts to provide such special accommodation.

1.13 LIVING WAGE

The Master Contractor 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.

1.14 CHANGE ORDERS

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

1.15 IRANIAN NON-INVESTMENT

A proposal submitted by an Offeror shall be accompanied by a completed Certification Regarding Investments in Iran. A copy of this Certification is included as Attachment 16 of this TORFP.

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SECTION 2 – SCOPE OF WORK

2.1 PURPOSE

The MSDE is issuing this CATS+ TORFP to obtain one (1) Master Contractor and their MBE Partner to provide labor and supervision for Operations and Maintenance (O&M) support activities for the MARS Application.

Unless terminated earlier as provided in the Master Contract, the TO Contractor shall provide the services described in the TO Proposal and in accordance with the CATS+ TORFP upon receipt of a Notice to Proceed from the TO Manager. The term of this TO Agreement is for a period of one base period commencing on the date of Notice to Proceed (NTP) and terminating one calendar year after NTP, followed by four one-year option periods.

Specifically, the OSCNP seeks the expertise to resolve logged production issues via approved Work Orders (WO) to implement mandated updates, maintain and improve security, and resolve performance matters for the current MARS Application as more fully described in this CATS+ TORFP. Services shall include modifying source code and software configurations, enhancing the intranet and extranet web-based solutions hosted by MSDE, and solving logged support issues to maintain successful operation of the MARS application.

MARS is critical to the efficient processing of customer: applications and supporting materials, claims and payment processing; as well as providing oversight of customer activities, and publishing State and federal Reporting. The State of Maryland, federal legislation, and the General Assembly continue to place additional demands on MSDE to increase effective participation in the Nutrition Food Programs.

Throughout the duration of this contract, the TO Contractor shall provide resources as needed in response to WOs. At times the WO will not require fulltime resources and during peak times efforts may require multiple resources. For peak scheduling purposes the TO Contractor shall supply resources as needed to delivery scheduled WOs, at no time will the TO Contractor be required to provide more than: two (2) concurrent web programmers, two (2) concurrent software engineers, two (2) concurrent documentation specialist, two (2) concurrent testing specialist as resources for a scheduled release. The resources working on MARS Work Orders will not exceed a total combination of 12 qualified resources at one time.

2.2 REQUESTING AGENCY INFORMATION

MSDE, under the leadership of the State Superintendent of Schools and guidance from the Maryland State Board of Education, develops and implements standards and policy for education programs from pre-kindergarten through high school. MSDE's five public education priorities are: improving student achievement; building educators' capacity to improve achievement; building an aligned, understandable system of instruction, curriculum, and assessment; fostering positive school environments; and involving families in education.

MSDE has been recognized for its leadership and innovative solutions in the OSCNP for the support of Nutrition Program agencies and their sites throughout the State.

MSDE OSCNP Organizational Principles

- a. Provides quality products and services to all customers
- b. Embraces the mission of the following United States Department of Agriculture (USDA) and the State Maryland Nutrition Programs:
 1. School Meals
 2. Special Milk
 3. Summer Food Special Program
 4. Family Child Care
 5. Child And Adult Care Centers
 6. Food Distribution Program
 7. Fresh Fruit And Vegetable Program
 8. Maryland Meals For Achievement
- c. To be accountable to our customers and to use public resources effectively

- d. Committed to increasing participation in our programs by developing awareness
- e. Believe cultural diversity, mutual trust, respect, open communication, and celebration of achievements is essential to a productive organization

2.3 MANAGEMENT ROLES AND RESPONSIBILITIES

- a. TO Procurement Officer - The MSDE staff person named in the Key Information Summary Sheet responsible for managing the procurement process resulting in a TO Agreement for project personnel.
- b. TO Manager - The TO Manager for this procurement will be the MSDE Project Manager of the specified project. The TO Manager is responsible for overseeing the work required under the TO Agreement and approval of deliverables;
- c. TO Contractor - A Master Contractor awarded a TO Agreement for TO Contractor Personnel. The TO Contractor shall provide the project personnel and shall report to the TO Manager.
- d. TO Contractor Personnel - The personnel assigned by the TO Contractor for staffing services according to this TORFP, providing the service of database development, portal development, system integration and testing reporting to the TO Manager.

2.4 SYSTEM BACKGROUND AND DESCRIPTION

More than 850 users—where the majority are sponsoring agencies for up to five (5) USDA programs— access MARS internally and externally to track all aspects of nutrition program applications and claims for reimbursement. With the implementation of MARS, MSDE has streamlined many processes with a common internet tool and has eliminated all legacy and paper driven processes.

The MARS Intranet site offers authorized OSCNP staff to approve applications and claims, research contact information, and send template emails from within MARS.

The MARS Internet Portal, allows all customers to maintain agency, program, and site applications and agency claims using the internet. Several processes have been updated to include real-time uploads of site application and claims reimbursement data files.

MSDE has support staff and contracts in place to manage data center operations, network operations, Internet services, website hosting, MARS help desk, and MARS customer training. These activities are outside the scope of this TORFP.

The MSDE MARS Project Steering Team determines the nature and priority of system changes in order to meet current and anticipated business needs. The primary objective of this TORFP is to maintain MARS as a stable, responsive system to enable OSCNP staff and its customers to certify and reimburse qualified customers participating in supported federal and State funded food programs.

MARS is critical to providing certification and reimbursement to participating public and private agencies. The following summarizes the sponsorship, current status, impact, and operation and reporting calendars of the MARS Environment:

- a. OSCNP at MSDE is the business stakeholder responsible for MARS.
- b. The original development vendor and the current support TO Contractor transitioned MARS into Operation and Maintenance in January 2013.
- c. The current support TO Contractor is working under the CATS-II Task Order Agreement, is scheduled to continue and will support MARS and provide knowledge transfer up to May 30, 2014.
- d. There are approximately 700 external private and public agencies relying on MARS for the processing of their applications and monthly claim reimbursement.
- e. MARS monitors 5 USDA Programs and depending on the UADS Program, their business cycle starts and stops based on the Solar Calendar, State Fiscal Year, and federal Fiscal Year. Several schedules events such as Program Renewals and Certification, claims processing, federal Reporting, and Budgets, share dependencies between the three calendars.

2.4.1 MARS ENVIRONMENT

MSDE uses Virtual Local Area Networks (VLANS) to manage network communications. Browser based communication with MARS -is secured using Secure Socket Layer (SSL) technologies.

MARS System Testing, User Acceptance Testing (UAT) and Production Environments are all on segmented with restricted access controlled by network access controls. The MARS UAT environment also includes a facility to allow designated staff to certify interface files prior to allowing the Agency to use the streamlined process. The MARS UAT environment also allows staff to conduct formal classroom training for MARS users.

This VLAN configuration allows the MARS Testing and UAT environments to be separated from MARS production environment and MSDE/OIT manages the associated access by way of an Access Control List.

The intranet production version of MARS is accessed by MSDE OSCNP staff and uses role base security to restrict access. After logging into the MSDE network, the OSCNP staff has access to email list and services, network printers, servers, internet, stored documents, MARS reporting servers, and the MARS intranet server.

The MSDE Network Domain includes enterprise servers to manage: documents, email, sever backups, network authentication, DNS services, file storage, SQL clustering, and printing services.

Limited remote access to the MSDE internal network is gained by using an authorized VPN client based on user profile managed by MSDE/OIT.

Source code is hosted on Microsoft Team Foundation Server 2010 (TFS) with SharePoint Services 2010. Access managed by active directory and Microsoft Unified Access Gateway (UAG)

MARS manages and produces bookmarked Word documents, emails, and PDF files. Therefore, Microsoft Office and related add-ons are installed on the servers to allow these files to be created and viewed from the server.

MARS is based on the Microsoft .NET platform and a proprietary Commercial Off The Shelf (COTS) source library owned by the original developer, MS Technologies, located in Rockville Maryland (www.mstechnologies.com). Currently there are WOs in place to eliminate and reengineer the calls to the COTS source library. All legacy operations used prior to the completion of the MARS Application have been shut down. However, a read only instance of the legacy SQL database is available to assigned OSCNP staff using Microsoft Access as a read only tool for limited historical reference.

- a. MARS relies upon the following Enterprise technologies and components at MSDE:
 1. Microsoft Team Foundation Server
 2. Microsoft Forefront Unified Access Gateway
 3. Microsoft Windows Server Microsoft Active Directory
 4. Microsoft SharePoint Server - website management
 5. Microsoft SharePoint Server - search and document management
 6. Microsoft SQL Server
 7. Microsoft Internet Information Services
 8. Microsoft Internet Explorer
 9. Microsoft Exchange
 10. Microsoft Office
- b. Customizations includes:
 1. Custom Microsoft Word templates with bookmarks to pre-populate emails and MSWord documents
 2. Custom security functions and access control based on group and role concepts
 3. Custom database to maintain the data for the custom applications
 4. Custom database maintenance packages in the form of Microsoft SQL packages
 5. Custom Microsoft scheduling functions for reporting and emails based on configurable events
 6. Custom reports, delivered through Microsoft SQL Reporting Services

2.4.2 MARS INTERFACES

- a. MARS produces a payment batch file on demand to be processed in the State's Financial Management Information System (FMIS) located in Annapolis.
- b. OSCNP publishes a spreadsheet containing Family Child Care and Child and Adult site information within MARS to assist the Division of Family Child Care to compare demographic information with the Child Care Administrative Tracking System (CCATS).
- c. MSDE CCATS publishes a monthly spreadsheet that is uploaded into MARS. MARS has a batch process to monitor revocations and also to provide real time validation when the users enter their Child Care license number and expiration dates.
- d. MARS has a limited read only view of the MSDE Financial Data Warehouse to track payments and to validate vendor information. MSDE/OIT monitors the weekly upload of data to the Financial Warehouse.
- e. The USDA offers several reporting systems including: Food Programs Reporting System (FPRS), Web Based Supply Chain Management (WEBSCM), and Verification Data Reporting System (VDRS).
- f. MARS uploads data from the federal Internal Revenue Service (IRS) to monitor Revocation of non-Profit Status and to validate tax-ID information entered by the customers,
- g. MARS offers customers the option to perform batch uploads of their site application information using a fixed length file in American Standard Code for Information Interchange (ASCII) format. All Family Child Care Agencies make use of this time saving option and it is critical to getting sites approved. Several large schools systems also use this feature for School Meal and Summer Food sites.
- h. MARS also offers upload alternative to agencies wishing to avoid duplicating data entry of their monthly claim processes. Agencies have the option to upload interface file containing claim information in a fixed length file in ASCII format.
- i. MARS uploads and makes available to agencies sponsoring the School Meals Program, data files from the Maryland Department of Human Resources (DHR) twelve times a year. This process parses out the data for the agencies, and allows for participating agencies to access a streamlined, direct certification process throughout the year. This highly visible process helps increase the numbers of students directly certified for free meals.

2.5 PROFESSIONAL DEVELOPMENT

Networking technology, developer tools, software products, and best practices continuously change. The TO Contractor shall ensure continuing education opportunities for the personnel provided. This training would be associated with the technologies currently utilized by MSDE or anticipated to be implemented by MSDE in the near future. With MSDE's prior approval, the time allocated to these continuing education activities for staff deployed to MSDE on a full-time basis may be charged to this task order. Actual course costs, travel, and related expenses are the responsibility of the TO Contractor.

2.6 REQUIREMENTS

- A. The TO Contractor shall perform all work for this project in the Continental US. No work can be performed or outsourced to resources located outside of the Continental U.S.
- B. The TO Contractor shall perform all work under this TORFP against assigned and approved WOs. WOs will be assigned as needed based on a time and materials (T&M) basis, not-to-exceed total hours defined in Attachment 1 - Price Proposal. The initial planned work order will be for the following deliverables: Project Management Plan, Transition Plan, and knowledge transfer.
- C. The TO Contractor shall provide MSDE with fully loaded hourly rates for T&M services of experienced offsite and onsite support of the MARS system on an as needed basis.

- D. The resulting Contract from this TORFP shall be an Indefinite Demand Indefinite Quantity (IDIQ) T&M Labor Price Contract (as defined in COMAR 21.06.03) subject to the contract ceiling amount that shall not be exceeded without the necessary Contract Modification and Change Order (CO) approval requirements.
- E. The TO Contractor shall supply staff that meets the minimum qualifications for each resource described in Section 2.15.
- F. The TO Contractor shall perform all work submitted to the TO Contractor via WOs, generated and approved by the MARS Steering Committee. When deemed necessary by MSDE and the TO Contractor, onsite maintenance efforts may be required to complete all or part of a WO.
- G. The TO Contractor shall provide a schedule and participate in knowledge transfer meetings with the current support contractor and executive stakeholders so the TO Contractor can seamlessly assume control of the release of federal reports in January and June. Also, included in the knowledge transfer, the TO Contractor will begin integration management efforts for the MARS production release scheduled for May 20, 2014.
- H. The TO Contractor shall provide price per WO based on its direct labor hours expended at the fully loaded hourly rates. The labor rates for the Labor Classification shall include all direct, indirect costs, general and administrative, and profit for the TO Contractor. TO Contractor resource management, cost of generating invoices, software and hardware purchases needed to operate the TO Contractor's business, and expenses incurred to track activities and to build invoices and supported documents are all considered indirect costs and cannot be billed directly to MSDE.
- I. The TO Contractor shall utilize the Attachment 1 (Price Proposal) as part of the TO Contract and will detail the not-to-exceed yearly T&M allocation in hours and hourly rates per labor categories. MSDE reserves the unilateral option to renew the contract subject to State appropriations and the Contract will not exceed the end date of the DoIT CATS+ Master Contract.
- J. The TO Contractor shall provide a browser enabled WO tracking tool to track all WOs as they progress. The web enabled tool shall be accessible by both the TO Contractor and OSCNP staff. The tool shall allow for clarifying documents, and status updates, between MSDE and the TO Contractor during development and testing of the WO. The WO tracking tool shall track expended hours on a WO, an executed copy of the WO, date work was initiated, and contact information.
- K. The TO Contractor shall not proceed with any work until after a work is defined and approved in accordance with the WO approval process and with the policies and procedures defined in this TORFP.
- L. The TO Contractor shall NOT be responsible for maintaining MSDE data storage hardware, networking hardware, server hardware, or desktop computers. The TO Contractor shall participate in scheduled meetings and provide technical input to MSDE-OIT regarding proposed configuration modifications, upgrades to the MARS environment, scheduled maintenance, and performance issues. The management of storage area network (SAN), network devices, system hardware, and desktop devices are covered by third party support contractors and by MSDE/OIT support staff.
- M. The TO Contractor shall provide documented, license and industry tools, such as Webex.com, Logmein.com, or Joinme.com, to aid with remote support.

2.6.1 WO PROCESSING

The TO Contractor shall adhere to these requirements for the WO process.* The TO Contractor shall supply a Not-to-Exceed estimated effort in 30 minute increments for all work prior to being granted NTP by TO Manager.

- a. Provide formal request and obtain prior approval if additional work hours are needed to complete an approved WO.
- b. Develop design, test plan and traceability documents for all WOs, and conduct quality assurance testing, and demonstration prior to MSDE. As part of Quality Assurance (QA), the TO Contractor shall update technical materials. MSDE's support team will finalize acceptance of the WO by completing user acceptance testing prior to authorizing the TO Contractor to work with MSDE/OIT and migrate the completed work to production.

*All WOs for enhancements require at least minimal System Development Life Cycle (SDLC) documentation to address design, development, testing, and implementation steps to control scope, cost, and time, i.e., pre-approved requirements, milestone schedule, testing and fault remediation processes. Specific SDLC artifacts will be requested with each WO.

2.6.2 SUPPORT MARS ENVIRONMENTS

TO Contractor shall maintain and support MARS in the production, testing, and training environments. The TO Contractor shall perform services including:

- a. Collaborate with MSDE/OIT to maintain effective business operations and availability of MARS.
- b. Recommend installation patches, application roll-back, data recovery strategies, and testing failover strategies, and consulting on operating system upgrades to solve reported issues.
- c. Provide SQL scripts as needed to support approved WO, and
- d. Unless specified in the WO, the following steps are used to manage the release of a WO to production including WO Development, Testing, UAT, and Production Release:
 1. The TO Contractor shall present and document executed quality assurance (QA) measures prior to demonstrating and releasing completed tasks for User Acceptance Testing (UAT) by MSDE.
 2. As part of system testing, the TO Contractor shall perform regression testing, based on MSDE defined test cases, to identify issues introduced as a result of code changes, and the TO Contractor shall take all actions necessary to ensure continuity of services for MARS system.
 3. With completion of code change/release for UAT, the TO Contractor shall present results of system testing and demonstrate the completed work prior to releasing to the UAT environment.
 4. After delivery and acceptance of the executed system test plan and system test results, the TO Contractor shall deploy updated program code to MARS UAT environment where OSCNP staff will conduct final UAT.
 5. After OSCNP has completed UAT, the TO Contractor using team foundation server and SharePoint services, shall work with MSDE/OIT staff to deploy the WO to the Production environment.
- e. Upgrades system components or add-ons. This includes but is not limited to:
 1. The TO Contractor shall provide configuration parameters for technical upgrades to system technology. This includes but not limited to, Internet Information Services, Web Services, and SQL reporting services.
 2. The TO Contractor shall provide scheduled production updates and software support of the MARS system. MARS is a multi-tier ASP.NET framework solution using a SQL Server 2005 database backend in a clustered enterprise environment.
- f. Manage production database change control. This includes but is not limited to:
 1. The TO Contractor shall develop test scripts in the development and test environment prior to supplying the scripts and instructions to MSDE/DBA. The MSDE/DBA will review and execute TO Contractor provided scripts.
 2. The TO Contractor shall have local administrative access to MARS dedicated test servers and MSDE/OIT will manage enterprise resources. As such, the TO Contractor shall not have direct access to any production enterprise servers.
- g. Manage updates to SharePoint and websites. For updates to SharePoint and website updates, the TO Contractor shall provide files to a secured staging area, and instructions to MSDE/OIT staff. MSDE/OIT staff will review the scripts and instructions prior to applying them to production.

- h. Troubleshoot and resolve production issues/defects that could not be solved through the MARS Help Desk or MSDE technical resources as they arise in accordance with the Service Level Agreement (SLA) described in Section 2.8.14.
- i. Support advanced data mining to access MARS data and shall provide ad-hoc reports for MSDE Executive Management, the USDA, the Office of the Governor, legislators, etc.
- j. Provide support for improving the business process, USDA re-authorization requirements, and legislative changes requirements.
- k. Provide knowledge transfer to other support entities at MSDE and their external resources to ensure detailed understanding of system components necessary for business continuity.
- l. Provide application source code and documentation along with written updates on the status of deliverables, technical and/or business issues, concerns, and risks as part of the knowledge transfer process. The TO Contractor shall also provide ERWIN compatible data models, database schema and a data dictionary.
- m. Support MSDE/OIT initiatives in a limited capacity to provide migration support as it relates to MARS and the new infrastructure environment. The TO Contractor shall participate in meetings and conference calls related to updates to MARS and the computing environment.
- n. Complete the assigned tasks to modify MARS to these infrastructure improvements. MSDE is implementing technology updates that will impact MARS. WOs will be released to define the tasks. Current technology improvement efforts at MSDE include but are not limited to:
 - 1. Migrating to interface files to use a new secure transport solution for user interface uploads
 - 2. Improving search capabilities of the MARS resource library by integrating the MARS custom Document Management System into a SharePoint 2010 document management solution.
 - 3. Integrating MARS into the MSDE SharePoint hosting solution
 - 4. Completing the migration from the original developers COTS Library solution and incorporating Microsoft Active Directory (AD) functions creating a single sign-on for intranet user
 - 5. Adding Microsoft Exchange API solutions for managing calendars and email templates

2.7 WORK ORDER PROCESS

The TO Contractor shall adhere to the requirements for the processing of WOs. The TO Contractor shall provide services via the WO Template (Attachment 15) and execute the WO using the pre-approved fully loaded labor rates applicable to the proposed labor categories.

- a. The TO Manager will e-mail a WO request to the TO Contractor to provide services. The request will include:
 - 1. Technical requirements and description of the services needed
 - 2. Performance objectives and /or deliverables, as may be applicable
 - 3. Due date and time for submitting a response to the request
 - 4. Performance testing period
 - 5. Other specific information as requested from the TO Contractor
- b. The TO Contractor shall review written WO requests from MSDE describing the work and shall host meetings to confirm scope and technical issues.
- c. The TO Contractor shall then e-mail a response to the TO Manager in the form of a design document within the specified time which shall include at a minimum:
 - 1. Response that details the TO Contractor's understanding of the work.

2. Description of the proposed work plan in narrative format including time schedules, and if required, a Work Breakdown Structure (WBS) chart. This description shall include a schedule of resource and related tasks, including an explanation of how tasks will be completed.
 3. Design Documents will include impacted data items, web pages, reports, edit checks, and Testing Strategies.
 4. Identification of those activities or phases that can be completed independently or simultaneously versus those that must be completed before another activity or phase can commence.
 5. Unless stated in the WO, all work will be performed remotely. Escalated issues may require TO Contractor to provide an onsite presence at the MSDE location.
 6. State-furnished information, work site, and/or access to equipment, facilities, or personnel; the personnel resources; and the estimated hours required to complete the task In 30 minute increments for each labor category required.
 7. Note any materials and the cost or the estimated costs (if the situation absolutely requires an estimate versus an actual cost at the time).
- d. The TO Manager will review the response, sign, and date the document, and will then provide a NTP. The TO Contractor shall keep track of all billed hours and shall include them in the bi-weekly status reports.
- e. WO Acceptance:
1. Upon UAT completion of a WO, the TO Contractor shall document and present each deliverable defined in the WO, in final form to the TO Manager along with an Agency Receipt of Deliverable Form (Attachment 12) and an Agency Acceptance of Deliverable Form (Attachment 13).
 2. After confirming test results and acceptance with stakeholders, the TO Manager shall sign and check the appropriate box prior to returning the Agency Acceptance of Deliverable Form (Attachment 13) to the TO Contractor.
 3. In the event of rejection, the TO Contractor shall correct the identified deficiencies or non-conformities and resubmit the deliverable for UAT before submitting a new Agency Acceptance of Deliverable Form to the TO Manager.

2.8 TO CONTRACTOR PERSONNEL DUTIES AND RESPONSIBILITIES

At a minimum, the work to be accomplished by the TO Contractor Personnel under this TORFP shall consist of the following:

2.8.1 ALL TO CONTRACTOR PERSONNEL RESPONSIBILITIES

All TO Contractor Personnel shall:

- a. Review, confirm and act on reported production issues until resolved based on the SLA described in Section 2.8.14.
- b. Update technical documentation identified in each assigned WO.
- c. Provide support for implementing legislative mandates through enhancements in accordance with Section 2.6.1.
- d. Provide small system enhancements in accordance with Section 2.6.1.
- e. Use Team Foundation Server to manage course code, rollback functions, assigning work, prioritizing WOs, testing, and scheduling activities.
- f. Perform all development work using Team Foundation Server, and shall participate in audits by MSDE OIT.
- g. Schedule production releases with MSDE/OIT staff.

- h. Use MSDE SharePoint Server to track reported production issues, task orders, and schedules.
- i. Use MSDE/OIT managed VMWARE environments for development, QA testing, and UAT testing.

2.8.2 IT PROFESSIONAL RESPONSIBILITIES

All IT Professional assigned shall:

- a. Design, update, develop and administer the SQL Server Database in Test and UAT environments and provide scripts to the DBA at MSDE-OIT to manage stored procedures and field attributes to the Production SQL the as part of the upgrade and implementation of MARS and assigned WOs.
- b. Design and propose configuration strategies for SharePoint Service to improve searching and updates to the current documents stored in the MARS database.
- c. Configure, troubleshoot performance issues and maintain Microsoft Internet Information Services
- d. Provide configuration and workflow expertise on Microsoft Team foundation Server, Universal Access Gateway, and integrated SharePoint services for monitoring WOs and scheduled releases.
- e. Provide expertise for troubleshooting Microsoft Exchange Services and MARs design considerations for exploiting the latest API function for managing calendars, and email templates, and mailing lists.
- f. Manage data views and interfaces with existing Oracle and MS-SQL owned by MSDE.

2.8.3 SOFTWARE ENGINEER RESPONSIBILITIES

All Software Engineer assigned shall:

- a. Work within the standards of the Microsoft Team Foundation server and Universal Access Gateway services hosted at MSDE.
- b. Develop, configuring, integrating and supporting MARS.
- c. Integrate MARS with other applications including the SharePoint, other content management solutions
- d. Improve performance, data quality and storage; reporting capabilities; and workflow management process.
- e. Review, analyze and modify existing reports and applications.
- f. Participate in analyzing, documenting, and performing system configuration and setup as well as integration and system testing.

2.8.4 WEB DEVELOPER RESPONSIBILITIES

All Web Developer assigned shall:

- a. Architect, design and develop SharePoint implementations using best practices.
- b. Maintain web data collections of timely and sensitive materials
- c. Implement and customize SharePoint-based solutions.
- d. Implement SharePoint-based workflows.
- e. Perform Microsoft .NET development to extend and augment the SharePoint platform.
- f. Manage browser compatibility.
- g. Developed solutions to web user ergonomics and Web Standards.
- h. Design and develop and improve active dashboards to provide summary information.

2.8.5 TESTING SPECIALIST RESPONSIBILITIES

All Testing Specialist assigned shall:

- a. Review WO requirements; prepare and review test plans and test cases; and report defects and prepare test

reports.

- b. Design and execute IT software tests and evaluate results to ensure compliance with applicable regulations.
- c. Prepare test scripts and all required test documentation.
- d. Design and prepare all needed test data.
- e. Review test results and evaluate for conformance to design.
- f. Collaborate with a variety of stakeholders within MSDE to complete test procedures.
- g. Design, develop, implement and maintain test processes and test cases, including user manuals for assigned WOs.
- h. Perform test execution in development, test, and production environments for each build, sprint, and release in the iterative development lifecycle.
- i. Write test plans for assigned projects.
- j. Maintain record of test progress.
- k. Document test results.
- l. Prepare reports and present results as appropriate.

2.8.6 PROJECT MANAGER RESPONSIBILITIES

All Project Manager assigned shall:

- a. Be the primary point of contact for issue reporting, and WO progress.
- b. Be responsible for submitting bi-weekly status reports.
- c. Manage TO Contractor Resource.
- d. Provide bi-weekly updated schedules.
- e. Develop and maintain project management plan and related articles including risk and issue management.
- f. Attend status bi-weekly status meeting.
- g. Interact weekly with the MARS Project Manager on mitigating issues.

2.8.7 WEB DESIGNER RESPONSIBILITIES

All Web Designer assigned shall:

- a. Produce visual designs, and layouts that will lead web users through the complex business processes that make up MARS based on web standards
- b. Develop web pages and mock up based on Web Standards, Internet Browser Capabilities.
- c. Interact with MSDE Stakeholder on both technical and non-technical design issues.
- d. Design pages for locating site and producing direction using Google Maps.
- e. Troubleshoot issues with design and improve the customer web experience with MARS.
- f. Enhance designs to improve user experience, search engine optimization, and website maintenance
- g. Develops site navigation by categorizing content; funneling traffic through content
- h. Produce pre-design where appropriate utilizing storyboarding and graphics.
- i. Maintains site appearance by collaborating with MSDE-OIT on developing processes for enforcing content and display standards; editing submissions.

2.8.8 INTEGRATION SPECIALIST RESPONSIBILITIES

All Integration Specialist assigned shall:

- a. Manage scheduled releases
- b. Coordinate system testing, user acceptance testing, and production release.
- c. Provide communications on the status of release and what is included with the release
- d. Validate the completeness of all development efforts prior to release.
- e. Coordinate any intervention need with MSDE/OIT to complete the release to production including submitting stored procedures and scripts in advance for review by MSDE/OIT.
- f. Develop and maintain project management plan and related articles including risk and issue management.
- g. Validate when the release efforts have been completed, and report and issues
- h. Refine release processes based on lessons learned.

2.8.9 DOCUMENTATION SPECIALIST RESPONSIBILITIES

All Documentation Specialist assigned shall:

- a. Candidates will meet with developers, end users, and managers to interview them regarding a specific process.
- b. Create design documents, user documents, online help documents, and related deliverables using Microsoft Office, Visio 2010.
- c. Participate in requirement gathering efforts and documenting business requirements and specifications for software application development.
- d. Develop and manage help content, formal training materials, content pages, testing plans, training materials, technical design documents and training scripts as needed.
- e. Manage and design SharePoint solutions for storing reference materials and related WO articles.
- f. Update articles stored in Microsoft Team Foundation Server 2010 related to tracking bug fixes, and test results, and release management.

2.8.10 TRANSITION PLAN

Within 10 business days of NTP, the TO Contractor shall schedule and meet with MSDE/OIT and MSDE/OSCP to conduct initial knowledge transfer. MSDE has allotted for up to 300 resource hours with the existing TO Contractor, to allow the existing TO Contractor to transfer technical knowledge of MARS.

During the first sixty (60) business days of the Contract, the TO Contractor shall review the existing technical materials and schedule weekly meetings with appropriate Subject Matter Expert (SME). The TO Contractor should target managing the January Production Release with the existing TO Contractor available for technical support. After the January release, the TO Contractor shall take over maintenance efforts, WO programming, issue management and the existing TO Contractor shall be available for consulting until May 30, 2014:

The Transition Plan shall address:

- a. Developing a schedule for interim and complete transition of support within 30 days of notice to proceed.
- b. Targeting completion of knowledge transfer is within 45 days of notice to proceed with the TO Contractor assuming full control of all source code updates within by May 20, 2014 of notice to proceed, and the coordination of all future UAT and Production releases.
- c. Reviewing Source Code functions, naming conventions and location.
- d. Reviewing Server Configurations in System, UAT, and Production environments. Including IIS configurations and ODBC connections.

- e. Providing release Schedules for UAT and Production.
- f. Reviewing of the MARS database schema and SQL stored procedures.
- g. Reviewing of current Issue Log and preventative actions taken.
- h. Reviewing Scheduled WOs and their scope and transition efforts need.
- i. Reviewing TFS configurations and confirm access controls.
- j. Verifying of required Access Controls including network, local machine service accounts.
- k. Reviewing System Design and any configuration issues with either System Testing, UAT, or Production environments.
- l. Reviewing remaining COTS Library modules and documented function and references in the existing MARS source code.
- m. Reviewing SharePoint Services configuration.

During transition of support, the TO Contractors shall participate in joint bi-weekly status meetings with MSDE Stakeholders and the existing TO Contractor to confirm transition efforts, review schedules, and discuss transition issues and upcoming transition efforts.

2.8.11 PROJECT MANAGEMENT PLAN

Within 30 business days of NTP, the TO Contractor shall present a Project Management Plan. The Project Management plan shall include:

- a. Scope Management
- b. Requirements Management
- c. Schedule Management
- d. Financial Management including contact for MBE documents and Invoices
- e. Quality Assurance Management
- f. Resource Management including a staffing plan
- g. Communications Management
- h. Project Change Management
- i. Risk Management

2.8.12 RECURRING DUTIES

- a. TO Contractor Management Functions
 - 1. TO Contractor project manager, engineers, specialists, and designers shall use Team Foundation Server to manage development, deployment, and report on WO life cycle activities, such as: assigning priorities, progress activities, testing efforts, clarifying questions and responses, tracking builds, and rollback activities.
 - 2. TO Contractor project manager, documentation specialist, integration specialist and testing specialists shall use MSDE SharePoint server to store documentation, track reported production issues, store task orders, sign-off documents, and schedules.
 - 3. TO Contractor project manager shall maintain a project schedule using Microsoft Project. The schedule shall include all assigned WO, and Resources, and track work, projected completion, assignments, System testing UAT, Acceptance activities, and production release dates. The TO Contractor should use information in Team Foundation Server to manage the schedule.
 - 4. TO Contractor project manager shall keep track of all billed hours and include them in the bi-weekly status reports.
 - 5. TO Contractor project manager shall provide bi-weekly status reports, documenting maintenance efforts, progress, delays, risks, and an updated project schedule.
 - 6. TO Contractor project manager shall attend bi-weekly meetings with MSDE SME to focus on active WOs and clarification on testing and upcoming work.

7. TO Contractor project manager attend joint monthly meetings with MSDE stakeholders.
- b. TO Contractor shall assign appropriate staff to perform the following Technical Functions
1. TO Contractor project manager and integration specialist shall review, confirm, and act on reported production issues until resolved based on the SLA described in Section 2.8.14. The TO Contractor shall update technical documentation identified in an assigned WO.
 2. TO Contractor project manager and integration specialist shall use Team Foundation Server to manage source code, rollback functions, assign work, prioritize WO, test, and schedule activities.
 3. TO Contractor web designers, web developers, and software engineers shall perform all development work using Team Foundation Server, and shall participate in audits by MSDE/OIT.
 4. TO Contractor project manager and integration specialist shall schedule production releases with MSDE/OIT staff.
 5. TO Contractor project manager and integration specialist, testing specialist, and documentation Specialist shall use MSDE SharePoint Server to track reported production issues, WOs, and schedules.
 6. TO Contractor integration specialist, IT professional, web designers, web developers, testing specialist and software engineers shall use MSDE/OIT managed VMWARE environments for development, QA testing, and UAT testing.
 7. TO Contractor integration specialist and IT professional shall provide backups and business continuity strategies of software and hardware devices by the TO Contractor used to execute the WO. The MSDE/OIT has scheduled backups of the MARS Servers, source code, and database servers on a regular basis. This includes daily incremental backups and scheduled full backups of all servers hosted at MSDE. Daily backups are retained for one month, and weekly backups shall be retained for one year.
 8. The TO Contractor IT professional shall maintain consistent configurations and software services between Test, UAT and Production environment. Configurations include data stores, store procedures, SharePoint services, Microsoft IIS and SQL Reporting Services.
- c. After Notice to Proceed, the TO Manager will issue a WO to handle reported Production Issues. The TO Contractor shall provide T&M support for MARS reported production issues.

2.8.13 SOFTWARE RELEASE MANAGEMENT

The Software Release Management process includes revision control and the establishment of baselines. The TO Contractor shall use Team Foundation Server at MSDE to manage code, bundle releases, rollback releases, scheduled work, and perform change control.

- a. The TO Contractor shall assign, during WO Processing, UAT, or Operation and Maintenance release of software, a unique but incremental version for the software build scheduled for release. The incremental version shall clearly display in the lower left side of the user interface (UI) assigned to it.
- b. The TO Contractor, within the application, shall ensure the UI shall also displays whether it is operating under either a Test or Production version.
- c. Unless otherwise documented in the WO, the TO Contractor shall consider these factors in their production release of software:
 1. The TO Contractor integration specialist shall not load software releases into Production without first completing test and receiving notification of acceptance by the TO Manager.
 2. The TO Contractor integration specialist or project manager shall contact the TO Manager, at least 4 hours prior to the release of a software build to the UAT environment.
 3. The TO Contractor integration specialist or project manager shall generate a Software Release Email (SRE) to the TO Manager. The email shall include all items addressed in the build and build number being moved to the designated environment (Production or UAT).

4. After reviewing the SRE, TO Manager will decide when the items referenced in the SRE can be moved, and will convey the information by replying to everyone listed in the SRE. At a minimum, the TO Contractor integration specialist shall require at least 2 hours lead time to setup the upload.
5. The TO Contractor integration specialist shall plan software releases as part of scheduled afterhours work. For uptime performance quality issues, the TO Contractor may not release software prior to weekends or holidays as MSDE resources must be available to verify the application is functioning the prior to allowing external users access to MARS.
6. After the TO Contractor has moved a release to the UAT environment, the TO Contractor shall alert TO Manager by email that the Release is ready for UAT testing.
7. When the TO Contractor determines a Release is ready for UAT Release, TO Manager will assign OSCNP staff to perform acceptance testing the release.
8. Unless specified in the WO, OSCNP will complete its UAT efforts within 10 business days following the upload to the UAT environment. UAT issues identified by OSCNP with the Release will be logged into the web enabled issue tracking tool provided by the TO Contractor.
9. The TO Contractor shall work to quickly address issues logged into the issue tracking tool and shall notify users when they can retest. Once notified of the correction, MSDE staff will retest the release.
10. After the release has performed satisfactorily in the UAT environment, TO Manager will notify the TO Contractor to schedule the Software Release to be uploaded to Production.
11. If the Software Release impacts other application interfacing with MARS system, the TO Contractor shall work with and coordinate the release of the software with the support staff for those interfaces.

2.8.14 SERVICE LEVEL AGREEMENT

The TO Contractor is expected to provide adequate staffing to meet all of the items in the following table.

- a. Referenced Respond Time and Resolution Time are in calendar days and shall include any after hours efforts.
- b. All service level categories shall involve assisting MSDE/OIT and their agents with technical validation and troubleshooting efforts.

Level	Category	Respond Time	Resolution Time	Business and Financial Exposure	Work Outage	Clients Affected	Workaround
4	Critical	1 Hours or less	Within 2 hours	The issue creates a serious business or financial exposure; (system outage or critical functionality inaccessible):	The issue causes system outage or critical functionality to become inaccessible. Systems or users are unable to work or to perform a significant portion of their job.	The issue affects a number of clients, high profile clients (i.e. executive management, and critical systems)	There is no <i>acceptable</i> workaround to the problem (i.e. the job cannot be performed in any other way).
3	High	2 Hours or less	Within 4 hours	The issue creates a serious business risk or financial exposure: (system outage or critical functionality inaccessible):	The issue causes major portions of the system to be inaccessible. Systems or users are unable to work, or to perform some portion of their job.	The issue affects a number of clients, high profile clients (i.e. executive management, and critical systems)	There is no <i>acceptable</i> workaround to the problem (i.e. the job cannot be performed in any other way).
2	Routine	7 Days or less	Within 1 week	The issue creates a low business risk or	The issue causes the client to be unable to perform	The issue affects a number of clients	There is likely an acceptable

Level	Category	Response Time	Resolution Time	Business and Financial Exposure	Work Outage	Clients Affected	Workaround
				financial exposure	some small portion of their job, but there are still able to complete most other tasks. This may also include questions and requests for information.		workaround to the problem. The system, service or component is experiencing minor performance degradation.
1	Low	30 Days or less	As agreed by TO Manager	The issue creates a very low business risk or financial exposure	The issue is typically a request for service with ample lead time. This may also include questions and requests for information.	The issue affects a number of clients or individuals	There is an acceptable workaround to the problem.

2.8.15 WORK HOURS

- a. MSDE business support 7:30 AM to 6:00 PM
- b. MSDE core business hours 8:30 AM to 5:00 PM
- c. Maryland State Offices Scheduled Closings
<http://msa.maryland.gov/msa/mdmanual/01glance/html/holidaye.html>
- d. The OSCNP Help desk is staffed during MSDE business support hours. The TO Contractor shall provide resolution assistance to production issues logged during business support hours according to the SLA described in Section 2.8.14.
- e. The TO Contractor shall, as specified in the WO, take part in scheduled activities such as: JAD sessions, progress meetings, conference calls, Webinars, demonstrations, and meeting with stakeholders during core business hours.
- f. The TO Contractor shall, provide support services that include product releases, participation in business continuity exercises, system start up from planned system outages on evenings and/or weekend hours. These occurrences will be scheduled in advance.
- g. In addition to support during core business days, WO will be issues to have the TO Contractor provide support services on evening and/or weekend hours for MARS scheduled planned releases, and planned shutdowns and restarts of MSDE Data Center Operations. Hours performing these efforts will be billed at the fully loaded proposed rates.

2.9 DELIVERABLES/ACCEPTANCE CRITERIA

The table below describes TO deliverables and corresponding acceptance criteria. Additional WO deliverables will be defined as part of each WO including applicable SDLC deliverables. Acceptance criteria for tangible deliverables are based on accuracy, timeliness, clarity, and usefulness.

ID#	Deliverable Description	Acceptance Criteria	Expected Delivery Date/Frequency
2.9.1	Project Personnel	The TO Contractor shall be responsible for providing, on a continual basis for all assigned tasks, the personnel required in this TORFP within the timeframe required as specified in each WO. The TO Contractor shall ensure that: <ol style="list-style-type: none"> a. The resources shall meet the requirements described in Sections 2.15 and 2.16. b. MSDE has the right to interview any 	NTP ongoing

ID#	Deliverable Description	Acceptance Criteria	Expected Delivery Date/ Frequency
		proposed replacement prior to acceptance.	
2.9.2	Project Management Plan	TO Contractor shall deliver a Project Management Plan (PMP) in Microsoft Project. The PMP will describe how the TO Contractor will manage the Project: <ul style="list-style-type: none"> a. Scope Management b. Requirements Management c. Schedule Management d. Financial Management e. Quality Management f. Resource Management g. Communications management h. Change Management i. Risk Management 	NTP + 30 Calendar Days
2.9.3	Bi-Weekly Status Report	On a bi-weekly basis, the TO Contractor shall distribute the bi-weekly status report in Microsoft Word. The document shall contain current: <ul style="list-style-type: none"> a. Summary of project schedule showing tasks the current month to the projected production release b. List of open items, late items, work not started. c. List active tasks, percent complete and projected testing dates. d. Quality Assurance Actives including testing, highlighting successes/issues projected completion. e. Risks to any deliverables, and mitigation f. Detailed tasks accomplished that are not reflected in the WO status updates g. WOs not started and activities planned for the next reporting period h. Amounts invoiced-to-date and paid-to-date, include MBE payments 	Email Report to TO Manager no later than 10:00 AM 2 business days prior to meeting
2.9.4	Recurring Meetings	The TO Contractor shall participate in: <ul style="list-style-type: none"> a. Bi-weekly Status Meetings are each Wednesday at 10:00 AM. on Alternate Wednesday opposite of the Scheduled Status meetings the TO Contractor and the TO Manager will review and update the project schedule. b. Lessons Learned Meeting the week following a scheduled release to production: c. Bi-weekly meetings with SME from MSDE to review current WO and future WO. d. MSDE/OIT hosted Semi Annual Business Continuity and Capacity Planning meeting. Meeting agenda and schedule 30 days in advance. e. On a quarterly basis, the TO Contractor shall include a review of the TO Contractor performance and on time delivery of support material during the prior quarter 	NTP Ongoing
2.9.5	Transition Plan	The Transition Plan shall be delivered in Microsoft Word and shall address in detail: <ul style="list-style-type: none"> a. Milestones and key deliverable dates. b. The key transition personnel and their respective role. c. The reporting mechanism for providing, tracking progress and completion d. Transition methodology and sensitivity to 	NTP + 30 Calendar Days

ID#	Deliverable Description	Acceptance Criteria	Expected Delivery Date/ Frequency
		(OSCP) business processes. e. Risks and mitigation associated to transitions and/or Knowledge Transfers.	
2.9.6	Knowledge Transfer	The TO Contractor shall schedule and lead collaborative efforts to gain knowledge transfer by executing a Transition Plan. Efforts shall include meeting with the current TO Contractor, and MSDE SME to review materials documented in Section 2.8.10.	No to exceed 45 calendar days from NTP and completed no later than May 23, 2014.
2.9.7	Quarterly Production Releases	Prior to scheduling a production release the TO Contractor shall: a. Verify with MSDE/OIT, and MSDE PM that all technical, business, and scheduling requirements are acceptable b. All constraints have been addressed and satisfy the approved scope of work c. Has under gone all QA test and UAT efforts and approved for release by MSDE TO Manager. d. All scheduled updates will be logged in into MSDE Help Desk by MSDE PM at least 2 business days prior to the scheduled. e. Critical monthly business cycle is from the 7th to the 15th, during this cycle the MARS uptime performance is critical. f. The TO Contractor shall not have direct access to the production database server, and must deliver any scripts or stored procedures to apply any infrastructure and data fixes to MSDE/DBA for review at least one business day in advance of the needed implementation. g. All other impacted materials, will be delivered prior to acceptance of any changes, modifications or enhancements to the current system.	Due the third Tuesday of January, April, July, October for the life of the contract.
2.9.8	Quality Assurance Testing Results	TO Contractor shall have conducted adequate Quality Control, so that upon delivery the system is free from syntax errors, configuration issues, and data issues.	Unless otherwise stated in the WO, all QA and testing results will be due 1 Business Days prior to delivery for UAT
2.9.9	Warranty	For all deliverable, the TO Contractor shall strive to maintain the application in a stable, usable state and maintain system artifacts in current and orderly condition in accordance with industry. MSDE will log production issues. If a production issue is related to a recently released WO and was documented as passing in UAT, the TO Contractor shall work to correct the issue at no charge. If the issue is a result of hardware or configuration discrepancies, the TO Contractor will charge the hours of effort against the WO to process production issues and MSDE-OIT shall resolve the hardware or configuration issue.	Unless otherwise stated in the WO, The warranty shall be 90 Calendar Days after released to production.

2.10 PERFORMANCE EVALUATION

TO Contractor personnel will be evaluated by the TO Manager on a quarterly basis for each assignment performed during that period. The established performance evaluation and standards are included as Attachment 14.

2.10.1 PERFORMANCE PROBLEMS MITIGATION

In the event the agency is not satisfied with the performance of TO Contractor Personnel, the mitigation process is as follows:

- a. The TO Manager will notify the TO Contractor and MSDE Procurement Office in writing describing the problem and delineating remediation requirements;
- b. The TO Contractor shall have five (5) business days to respond with a written Remediation Plan;
- c. The Remediation Plan shall be implemented immediately upon acceptance by the TO Manager;
- d. Should performance issues persist, the TO Manager will notify MSDE Procurement Office; and
- e. The MSDE Procurement Office will give written notice to the TO Contractor to request immediate removal, or substitution of the individual whose performance is at issue.
- f. Resumes shall be signed by all substituting individuals and their formal supervisor, and the official resume of the previous employee shall be provided for comparison purposes.

2.11 SUBSTITUTION OF PERSONNEL

The substitution of personnel procedures is as follows. The TO Contractor may not substitute personnel without the prior approval of the agency. To replace any personnel, the TO Contractor shall submit resumes of the proposed personnel specifying their intended approved labor category. All proposed substitute personnel shall have qualifications equal to or better than those of the replaced personnel and must 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 of acceptance or denial of the requested substitution.

2.12 HARDWARE, SOFTWARE, AND MATERIALS

Hardware and Software procurement are not part of the TO. The TO Contractor is responsible for all software and hardware at their location.

2.13 REQUIRED POLICIES, GUIDELINES AND METHODOLOGIES

The TO Contractor shall be required to comply with all applicable laws, regulations, policies, standards and guidelines affecting information technology projects, which may be created or changed periodically. The TO Contractor shall adhere to and remain abreast of current, new, and revised laws, regulations, policies, standards and guidelines affecting project execution. The following policies, guidelines and methodologies can be found at <http://doit.maryland.gov/policies/Pages/ContractPolicies.aspx> under "Policies and Guidance." These may include, but are not limited to:

- I. The State's System Development Life Cycle (SDLC) methodology
- II. The State Information Technology Security Policy and Standards
- III. The State of Maryland Enterprise Architecture
- IV. The State of Maryland Information Technology Non-Visual Access Standards

2.14 TO CONTRACTOR COMPANY MINIMUM QUALIFICATIONS

The TO Contractor shall demonstrate the following.

- a. At a minimum Key Personnel shall be prepared to participate in the oral presentation. MSDE has determined Key Personnel are the: Project Manager (PMP), Integration Specialist, Testing Specialist, and Web Designer.

- b. The TO Contractor shall have at least five (5) years of experience reviewing written non-technical requests describing the work and shall host meetings to confirm scope and technical issues. Qualifying TO Contractor will be asked to provide samples of related work during the interview selection process.
- c. The TO Contractor shall have at least five (5) year history of supporting and staffing a complex role based Intranet site with at least ten (10) internal named users and Internet Portal solutions with at least 100 named portal users.
- d. The TO Contractor shall have three (3) years of experience managing releases using Team Foundation Server maintaining applications and release management.
- e. The TO Contractor shall have a combined minimum three (3) years of experience designing web based application on a Windows Server platform that include management dashboards, scheduling functions, embedded email functions and email list management, automated reporting, and experience developing websites incorporating search results with Google maps functions.
- f. The TO Contractor shall show three (3) years of experience supporting system that collect and transmit personal and financial data over the internet.
- g. The TO Contractor shall have at least two (2) years prioritizing and managing multiple WO efforts on a T&M projects using scheduled release strategies.

2.15 TO CONTRACTOR KEY PERSONNEL MINIMUM QUALIFICATIONS

The following minimum qualifications are mandatory. The Master Contractor's Project Manager (PMP), Integration Specialist, Testing Specialist, and Web Designer are Key Personnel and shall demonstrate the following:

- a. The Integration Specialist and Testing Specialist shall have a combined three (3) years of O&M experience on systems for which they were did not originally design or implement the original multi-tiered Windows server solution.
- b. All Key Personnel shall have a combined three (3) years of experience working with customer Customer Relationship Management (CRM) solutions that include tracking workflow, and event messaging and alerts between customers and the Application shall have a minimum of two (2) years of combined experience maintaining and managing roll-out of websites using the Microsoft Team Foundation Server.
- c. All Key Personnel shall have a minimum two (2) years of combined experience maintaining intranet and extranet Web-based data collection production applications with at least 200 active users.

Each resource shall meet **the qualifications** for the specific Labor Classifications defined in this document and as defined in the CATS+ Labor Category for which they are identified. The minimum qualifications for each specific classification are:

2.15.1 PROJECT MANAGER (PMP) MINIMUM QUALIFICATIONS

The candidate shall meet the following minimum qualification criteria:

- a. Provide proof of current PMP certification.
- b. Five (5) years of experience managing, project life cycles, risk, resources, schedules, and oversight of internet and intranet software operation and support projects.
- c. Three (3) years of experience as an application programmer on large-scale IT projects, knowledge of computer equipment, and ability to develop complex software to satisfy design objectives.
- d. Three (3) years of experience managing internet projects for government agencies in a multi-tier environment.
- e. Three (3) years of experience using this Microsoft Project, Microsoft SharePoint, Microsoft Office, and Adobe.
- f. Three (3) years of experience with Application Lifecycle Management within Microsoft Team Foundation Server.

2.15.2 INTEGRATION SPECIALIST MINIMUM QUALIFICATIONS

The candidate shall meet the following minimum qualification criteria:

- a. BS in Computer Science or related field AND three years of integrating applications; OR, Five (5) years of managing integration and deployment of Intranet and web portals.
- b. Three (3) years of experience as the primary contact point for planning Software Integration, executing release strategies, and validating completion of software releases.
- c. Three (3) years of experience managing and assigning WO to developers and measuring their progress.
- d. Three (3) years, completing design documents, managing a team of developers, performing maintenance and new development using ASP.Net solutions in a Microsoft Team Foundation Server environment.
- e. Three (3) years of experience installing and maintaining IIS 7 configuration and related services.
- f. Three (3) years of experience using Application Lifecycle Management techniques release management and issue management, tracking bug fixes, and system testing, using Microsoft Team Foundation Server.

2.15.3 TESTING SPECIALIST MINIMUM QUALIFICATIONS

The candidate shall meet the following minimum qualification criteria:

- a. Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, **OR** three (3) years of equivalent experience in testing internet and intranet applications.
- b. Three (3) years of software testing experience (integration and acceptance) on multiple projects.
- c. Three (3) years of experience in verification and validation, software testing and integration, software metrics, and their application to software quality assessment, and demonstrated knowledge of system and project life cycles.
- d. Three (3) years of experience with testing database interfaces in a multi release project environment.
- e. Three (3) years of experience creating development and execution of test cases for Unit Testing, User Acceptance Testing, interoperability testing, System Integration testing and Performance testing of a multi-tier Internet and Intranet Solution.
- f. Three (3) years of experience performing requirement analysis.
- g. Three (3) years of experience conducting conference calls, webinars, to review test progress, developing and providing tools to improve the system test and acceptance process.
- h. One (1) years of experience with Application Lifecycle Management using Microsoft Team Foundation Server, tracking bug fixes, and test results, and release management.

2.15.4 WEB DESIGNER MINIMUM QUALIFICATIONS

The candidate shall meet the following minimum qualification criteria:

- a. BS in Computer Science or related field AND three years of system and/or programming experience; OR, five (5) years of programming and web page design experience.
- b. Qualified candidates will be asked to provide statistic or live demonstrations of their work. Samples of their work shall be presented during the oral presentation and interview process. The work shall demonstrate strong Visual Design and layout skill set, with an understanding of Web Standards, Internet Browser capabilities, and communication skills to both technical and non-technical stakeholders.
- c. Two (2) years of experience working interfacing with driving directions and Google Maps based on Search results, SQL search strings
- d. Three (3) years of experience programming and designing solutions using IIS.
- e. Two (2) years of experience designing website using ASP.Net, HTML,XML, CSS, and JavaScript.
- f. Two (2) years of experience working with SharePoint Designer, and Microsoft Visual Studio.
- g. Two (2) years of experience designing and implementing dashboards, workflow, graphics, templates, layouts, themes, typography, and visual standards.

- h. One (1) year of experience as the lead designer of an intranet and internet web based applications providing: mockups, and manage design documentation, style guides, and specifications.
- i. One (1) year of experience with Application Lifecycle Management using Microsoft Team Foundation Server tracking bug fixes, and test results, and release management.

2.16 TO CONTRACTOR PERSONNEL MINIMUM QUALIFICATIONS

The following **MINIMUM QUALIFICATIONS** are expected and will be evaluated as part of the Work Order Process.

2.16.1 IT PROFESSIONAL MINIMUM QUALIFICATIONS

The candidate shall meet the following minimum qualification criteria:

- a. BS degree in computer science or five (5) years of direct experience supporting a Data Center running Microsoft Active Directory, IIS, Microsoft Exchange, and Windows Enterprise editions of Microsoft SQL, Windows Server,
- b. Three (3) years of developing and maintaining .NET custom applications on the Microsoft platform,
- c. Three (3) years of work experience on SQL Server Reporting Services,
- d. Three (3) years of direct experience writing SQL stored procedures/functions,
- e. Three (3) years of experience configuring and troubleshooting Microsoft IIS,
- f. Three (3) years of combined experience configuring and troubleshooting Microsoft TFS, and Microsoft UAG.
- g. Three (3) years of combined experience configuring and troubleshooting Microsoft Exchange and Three (3) years of working with Microsoft SharePoint Services.
- h. Three (3) years of experience with SQL Server Agent.
- i. One (1) years of experience integrating data from Oracle databases to SQL server databases.
- j. One (1) years of experience working with web enabled systems that provide CRM functionality.

2.16.2 SOFTWARE ENGINEER MINIMUM QUALIFICATIONS

The candidate shall meet the following minimum qualification criteria:

- a. BS in Computer Science or related field combined with three years of system design and/or programming experience; OR, Five (5) years of system and/or applications programming experience
- b. Five (5) years of combined experience implementing business intelligence (BI) solutions on the Microsoft platform with significant experience and hands-on combined use of: ASP.Net, Java, and SQL
- c. One (1) years of experience programming API functions with Microsoft Office and Microsoft Exchange Server
- d. Three (3) years of combined experience developing applications using advanced technologies, such as Internet protocols or web-based technology. Technologies include HTML, XML, and ASP.NET applications and SQL Reporting Services.
- e. Two (2) years of experience working with or supporting a COTS Library Solution internet based application. (all experience must be referenced work experience and outside of training and certifications)
- f. Three (3) years of experience building and migrating application to various traditional Window devices, and tablet type platform.
- g. Three (3) years of experience with SQL/ Server 2005 (or greater) in support of data/database analysis, and data recovery/fix requirements.
- h. Two (2) years of experience with Application Lifecycle Management using Microsoft Team Foundation Server and Microsoft Unified Gateway (UAG)

- i. Two (2) years development CRM application (must be referenced experience outside of training and certifications)

2.16.3 WEB DEVELOPER MINIMUM QUALIFICATIONS

The candidate shall meet the following minimum qualification criteria:

- a. Five (5) years of web development programming experience or a BS in Computer Science or related field AND three years of web development programming experience.
- b. Five (5) years of experience designing, developing, maintaining, and deploying website applications, including product selection, configuration, installation, maintenance, and site specific under the .NET framework using ASP.NET, and Microsoft SQL Reporting Services, and Microsoft SQL relational databases.
- c. Three (3) years of experience designing portal websites, using Secure Socket Layer (SSL) and role based security.
- d. Three (3) years of experience incorporating Active Directory Services into web-based application.
- e. Two (2) years of experience integrating applications with Microsoft SharePoint server including: content management, search criteria, and document management.
- f. Two (2) years of experience with Application Lifecycle Management using Microsoft Team Foundation Server
- g. Three (3) years of combined experience in Technologies that must include SharePoint, Microsoft SQL, Microsoft .NET Framework, and Visual Studio
- h. Two (2) years of experience integrating CRM type functionality and maintaining COTS Library solutions (must be referenced experience outside of training and certifications)

2.16.4 DOCUMENTATION SPECIALIST MINIMUM QUALIFICATIONS

The candidate shall meet the following minimum qualification criteria:

- a. Three (3) years of combined experience performing system requirements analysis, quality assurance, system integration.
- b. Three (3) years of combined experience building design documents, end-user requirement documentation, end-user testing documents, system test cases, technical and design documents using Microsoft Office, and Visio
- c. Two (2) years of experience gathering and documenting business processes and specifications for software application development
- d. Two (2) years of experience help content, formal training materials, content management, testing plans, training materials, technical design documents and training scripts
- e. Two (2) years of experience managing and designing SharePoint solutions for storing reference materials
- f. One (1) years of experience with Application Lifecycle Management using Microsoft Team Foundation Server tracking bug fixes, test results, and release management

2.17 TO CONTRACTOR PERSONNEL PREFERRED EXPERTISE

The preferred qualifications are in additions to the minimum and MINIMUM QUALIFICATIONS in Section 2.16 and 2.17. They will used to evaluate additional resources as they are added through the Work Order process. The more years of experience in each of the preferred qualifications may rank the resource higher as part of the evaluation process.

As extensive communications is a critical element of this project, all Key Personnel assigned to support MARS shall be able to fluently communicate in English in both written and verbal format. Communication skills must be evidenced by experiences delineated on resumes and will be verified through interviews at the oral presentations

The Master Contractor's Key Personnel preferred fluent in English are the:

- a. Project Manager (PMP)
- b. Integration Specialist

- c. Testing Specialist
- d. Web Designer

2.17.1 IT PROFESSIONAL PREFERRED QUALIFICATIONS

The candidate shall meet or exceed the following preferred qualification criteria:

- a. At least one (1) year of experience on SQL Server Reporting Services (SSRS) 2005/2008)
- b. At least one (1) year of experience configuring and troubleshooting Microsoft IIS-7
- c. At least one (1) year of experience configuring and troubleshooting Microsoft TFS 2010
- d. At least one (1) year of experience configuring and troubleshooting Microsoft UAG 2007
- e. At least one (1) year of experience configuring and troubleshooting Microsoft Exchange 2010
- f. At least one (1) year of experience configuring and troubleshooting Microsoft SharePoint service 2010 and 2013 specifically in configuring and managing: collaboration, content pages, document management, and search functions

2.17.2 SOFTWARE ENGINEER PREFERRED QUALIFICATIONS

The candidate shall meet or exceed the following preferred qualifications:

- a. At least one (1) year of experience on SQL Server Reporting Services (SSRS) 2005/2008.
- b. At least one (1) year of experience programming API functions with Microsoft Office and Microsoft Exchange Server
- c. At least one (1) year of experience working on COTS Library Solutions similar to those used by MARS (all experience must be referenced work experience and outside of training and certifications)
- d. At least one (1) year of experience with Application Lifecycle Management using Microsoft Team Foundation Server 2010 and Microsoft Unified Gateway (UAG) 2010

2.17.3 WEB DEVELOPER PREFERRED QUALIFICATIONS

The candidate shall meet or exceed the following preferred qualifications:

- a. At least one (1) year of experience integrating active dashboard designs into summary web pages
- b. At least one (1) year of experience integrating applications with Microsoft SharePoint 2010 server including: content management, search criteria, and document management.
- c. At least one (1) year of experience in Technologies that must include SharePoint 2010/2013, SQL 2008/2012, .NET 3.5/4.0 Frameworks, Visual Studio 2010/2012.

2.17.4 TESTING SPECIALIST PREFERRED QUALIFICATIONS

The candidate shall meet or exceed the following preferred qualifications:

- a. At least one (1) year of experience with testing database interfaces in a multi release project environment
- b. At least one (1) year of experience creating development and execution of test cases for Unit Testing, Financial Systems and testing security feature to secure personal information over the web.
- c. At least one (1) year of experience with Application Lifecycle Management using Microsoft Team Foundation Server 2010, for release management and tracking bug fixes with SharePoint services

2.17.5 PROJECT MANAGER (PMP) PREFERRED QUALIFICATIONS

The candidate shall meet or exceed the following preferred qualifications:

1. Shall provide proof of at least two (2) years PMP certification and must provide the expiration date the certificate. If the certification is up for renewal in less than 14 months then the TO Contractor must show the number of Personal Development Units (PDU) approved by PMI for recertification.
2. At least one (1) year of experience using this Microsoft Project 2010, Microsoft SharePoint 2010, Microsoft Office 2007-2013, and Adobe electronic signatures.

2.17.6 WEB DESIGNER PREFERRED QUALIFICATIONS

The candidate shall meet or exceed the following preferred qualifications:

- a. The TO Contractor shall include samples of work that demonstrates the proposed candidates understanding of web standards, design considerations for complex information gathering and for processing of sensitive/secure information over the web
- b. One (1) year of experience redesigning websites from the initial concept, impact, to release.
- c. One (1) year of experience integrating SharePoint services into an existing website.

2.17.7 INTEGRATION SPECIALIST PREFERRED QUALIFICATIONS

The candidate shall meet the following minimum qualification criteria:

- a. At least one (1) year of experience managing releases using .NET 3.0-4.0 framework.
- b. At least one (1) year of experience managing, Test and Production releases using Team Foundation Server 2010 environment and Microsoft Universal Access Gateway 2010 tracking bug fixes, and test results, and release management.

2.17.8 DOCUMENTATION SPECIALIST PREFERRED QUALIFICATIONS

The candidate shall meet the following minimum qualification criteria:

- a. At least one (1) year of experience building design documents, end-user requirement documentation, end-user testing documents, system test cases, technical and design documents using Microsoft Office 2010, Visio 2010
- b. At least one (1) year of experience managing and documents on SharePoint 2010-2013 solutions for storing reference materials
- c. At least one (1) year of experience with Application Lifecycle Management using Microsoft Team Foundation Server 2010 tracking bug fixes, and test results, and release management.

2.18 TO CONTRACTOR EXPERTISE REQUIRED

The TO Contractor shall include and be prepared to demonstrate details of like quality and kind type of work. Specifically, the work should demonstrate transitional support from a third party, design and website development, removal of COTS components, Team foundation Server, Unified Access Gateway, SQL database design and support.

The TO Contractor shall be capable of furnishing all necessary services required to successfully complete all tasks and work requirements and produce high quality deliverables described herein.

- a. The TO Contractor shall demonstrate, in its proposal, that it possesses experience and such expertise in-house or has fostered strategic alliances with other firms for providing such services in a WO based project with fluctuating demand.
- b. The TO Contractor shall have the ability to technically document work requirements and test plans. This will be validated during the interview process. Candidates will be required to submit samples of past work requirements and test plans for review. Sensitive information can be redacted.

2.19 INVOICE SUBMISSION

- a. Invoices shall be submitted by the TO Contractor on a monthly basis by the 15th business day of each month for all work completed in the previous month. Invoices submitted more than 30 calendar days late, will be reduced by 10% and will continue to be reduced every subsequent 30 calendar days until submitted.

- b. Invoice payments to the TO Contractor 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 Employer Identification Number (FEIN), as well as the information described below, and shall be submitted to the TO Manager for payment approval.

2.19.1 INVOICE FORMAT

- a. A proper invoice shall identify MSDE, labor categories and hours spent for each WO covered by the period of performance associated TO Agreement number, date of invoice, period of performance covered by the invoice, and a TO Contractor point of contact with telephone number.
- b. The TO Contractor shall send the original proper invoice and supporting documentation including: itemized billing reference for employees, and any subcontractor and applicable signed Attachment-13 for Accepted Deliverables, for each deliverable being invoiced) submitted for payment to the MSDE at the following address:

Accounts Payable
Maryland State Department of Education
200 West Baltimore Street
Baltimore, Maryland 21201

With a copy to:

Maryland State Department of Education
Office of School and Community Nutrition Programs
Attn: Robert Wancowicz OSE/OSCNP
200 West Baltimore Street
Baltimore, MD 21201

2.20 MBE PARTICIPATION REPORTS

Monthly reporting of MBE participation is required in accordance with the terms and conditions of the CATS+ Master Contract by the 15th day of each month. The TO Contractor shall provide a completed MBE Participation form (Attachment 2, Form D-5) to MSDE at the same time the invoice copy is sent. The TO Contractor shall ensure that each MBE Subcontractor provides a completed MBE Participation Form (Attachment 2, Form D-6). Subcontractor reporting shall be sent directly from the subcontractor to MSDE. The MSDE will monitor both the TO Contractor's efforts to achieve the MBE participation goal and compliance with reporting requirements. The TO Contractor shall email all completed forms, copies of invoices and checks paid to the MBE directly to the TO Procurement Officer and TO Manager.

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SECTION 3 - TO PROPOSAL FORMAT AND SUBMISSION REQUIREMENTS

3.1 REQUIRED RESPONSE

Each Master Contractor receiving this CATS+ TORFP shall respond within the submission 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 your CATS+ Master Contractor login screen and clicking on TORFP Feedback Response Form from the menu.

3.2 FORMAT

If a Master Contractor elects to submit a TO Proposal, the Master Contractor shall do so in conformance with the requirements of this CATS+ TORFP. The TO Proposal shall provide the following:

3.2.1 TO Technical Proposal:

A TO Technical Proposal shall contain the following sections in order:

- 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) Proposed Solution: A detailed discussion of the Master Contractor’s understanding of the work and the Master Contractor’s capabilities, approach and solutions to address the requirements outlined in Section 2, addressed in the exact order presented in Section 2.
 - 3) Draft Risk Assessment: Identification and prioritization of risks inherent in meeting the requirements in Section 2 - Scope of Work. Includes a description of strategies to mitigate risks. If the Risk Assessment appears as a deliverable in Section 2 – Scope of Work, that version will be a final version. Any subsequent versions should be approved through a formal configuration or change management process.
 - 4) Assumptions: A description of any assumptions formed by the Master Contractor in developing the Technical Proposal.
 - 5) Tools the TO Contractor owns and proposes for use to meet any requirements in Section 2.
- B) Compliance with Offeror’s Company Minimum Qualifications
 Offerors will complete the following table to demonstrate compliance with the Offeror’s Company Minimum Requirements in Section 2.14.

Reference	Offeror Company Minimum Requirement	Evidence of Compliance
2.14a	At a minimum Key Personnel shall be prepared to participate in the oral presentation. MSDE has determined Key Personnel are the: Project Manager (PMP), Integration Specialist, Testing Specialist, and Web Designer.	<i>Offeror documents evidence of compliance here.</i>
2.14b	The TO Contractor shall have at least five (5) years of experience reviewing written non-technical requests describing the work and shall host	<i>Offeror documents evidence of compliance here.</i>

	meetings to confirm scope and technical issues. Qualifying TO Contractor will be asked to provide samples of related work during the interview selection process.	
2.14c	The TO Contractor shall have at least five (5) year history of supporting and staffing a complex role based Intranet site with at least ten (10) internal named users and Internet Portal solutions with at least 100 named portal users.	<i>Offeror documents evidence of compliance here.</i>
2.14d	The TO Contractor shall have three (3) years of experience managing releases using Team Foundation Server maintaining applications and release management.	<i>Offeror documents evidence of compliance here.</i>
2.14e	The TO Contractor shall have a combined minimum three (3) years of experience designing web based application on a Windows Server platform that include management dashboards, scheduling functions, embedded email functions and email list management, automated reporting, and experience developing websites incorporating search results with Google maps functions.	<i>Offeror documents evidence of compliance here.</i>
2.14f	The TO Contractor shall show three (3) years of experience supporting system that collect and transmit personal and financial data over the internet.	<i>Offeror documents evidence of compliance here.</i>
2.14g	The TO Contractor must shall have at least two (2) years prioritizing and managing multiple WO efforts on a T&M projects using scheduled release strategies.	<i>Offeror documents evidence of compliance here.</i>

C) Proposed Key Personnel and Staffing Plan

- 1) Identify and provide resumes for all proposed Key Personnel (Project Manager, Integration Specialist, Testing Specialist, and Web Designer) listed in the Section 2.15 TO Contractor Personnel Minimum Qualifications. Highlight any of the preferred qualifications the proposed personnel meet or exceed.
- 2) Supply a Staffing Plan to demonstrate how the TO Contractor will deal with recruitment, fluctuation in demand, and the ability to retain to the institutional knowledge of resources during low demand. The Staffing Plan shall demonstrates how the Offeror will provide resources in addition to the personnel requested in this TORFP, and how the TO Contractor Personnel shall be managed.
- 3) Provide proof of active certification that proposed Key Personnel hold to meet the minimum qualifications in Section 2.15.
- 4) Provide two (2) current references (within the last five years) for each named resource including the name of the organization, point of contact, title and telephone number where the resource has provided

similar O&M or technical support services. The State shall have the right to contact any other references of its choosing as part of the evaluation and selection process.

- D) 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
- E) Provide a high level strategy to build the Transition Plan, identifying TO Contractor Resources that will participate in the Transition of support and their roles. For TO Contractor Resource other than the key resources, the Transition Plan must show qualifying past experience for the resource assigned roles, as well as any risks and mitigations to seamlessly transition from the current contractor to the new TO Contractor O&M maintenance team in approximately three months.
- F) MBE Participation
Submit completed MBE documents Attachment 2 - Forms D-1 and D-2.
- G) Subcontractors
Identify all proposed subcontractors, including MBEs, and their full roles in the performance of this TORFP Scope of Work.
- H) Master Contractor and Subcontractor Experience and Capabilities
 - 1) Provide three examples of work assignments that were similar in scope to the one defined in this TORFP. Each of the three examples, to be provided at the interview, must include a reference complete with the following:
 - a) Name of organization.
 - b) Name, title, and telephone number of point-of-contact for the reference.
 - c) Type and duration of contract(s) supporting the reference.
 - d) The services provided scope of the contract and performance objectives satisfied as they relate to the scope of this TORFP.
 - e) Whether the proposed personnel are still providing these services and, if not, an explanation of why services are no longer provided to the client organization.
 - 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 government entity of the State of Maryland. For each identified contract, the Master Contractor shall provide:
 - a) The State contracting entity,
 - b) A brief description of the services/goods provided,
 - c) The dollar value of the contract,
 - d) The term of the contract,
 - e) Whether the contract was terminated prior to the specified original contract termination date,
 - f) Whether any available renewal option was not exercised,
 - g) The State employee contact person (name, title, telephone number and e-mail address.

This information will be considered as part of the experience and past performance evaluation criteria in the TORFP.

- I) State Assistance
Provide an estimate of expectation concerning participation by State personnel.
- J) 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.

3.2.2 The financial response of the TO Proposal shall include:

A) A description of any assumptions on which the Master Contractor's Financial Proposal is based (Assumptions shall not constitute conditions, contingencies, or exceptions to the price proposal).

B) Completed Financial Proposal - Attachment 1 including:

The Master Contractor should indicate on Attachment 1 the appropriate Labor Category being proposed, and the Fixed Hourly Labor Category Rate. Proposed rates are fully loaded and cannot exceed the rates defined in the Master Contract. 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.

THE REMAINDER OF THIS PAGE IS INTENTIONALLY LEFT BLANK

SECTION 4 - PROCEDURE FOR AWARDING A TO AGREEMENT

4.1 EVALUATION CRITERIA

The TO Contractor 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, MSDE will consider all information submitted in accordance with Section 3.

4.2 TECHNICAL CRITERIA

The following are technical criteria for evaluating a TO Proposal in descending order of importance:

- A. The Master Contractor's proposed solution, understanding and experience of the TORFP Scope of Work based on the required response (Section 3.2.1.A).
- B. The capability of the proposed named candidates to perform the required tasks and produce the required tasks and deliverables in the TORFP Scope of Work –Section 2. Capability will be determined from the proposed individual's resume, reference checks, and oral presentation (See Section 1.4 Oral Presentations/Interviews).
- C. The Master Contractor Experience, Capabilities, and references as described in the Master Contractor's technical response (Section 3.2.1.B).
- D. Qualifications of Key Personnel, history with the TO Contractor, and experience required (Section 3.2.1.B).
- E. Ability for the Master Contractor to meet staffing expectations relative to supplying personnel for this TORFP meeting qualifications in Section 2.15 and 2.16 (Section 3.2.1.E)

4.3 SELECTION PROCEDURES

- A. TO Proposals will be assessed throughout the evaluation process for compliance with the minimum company and personnel qualifications in Sections 2.14 and 2.15 and quality of responses to Section 3.2.1 of the TORFP. Master Contractor proposals that fail to meet the minimum qualifications will be deemed not reasonably susceptible for award, i.e., disqualified and their proposals eliminated from further consideration.
- B. TO Proposals deemed technically qualified will have their financial proposal considered. All others will receive e-mail notice from the TO Procurement Officer of not being selected to perform the work.
- C. The State will conduct a in person oral presentation at the MSDE location with each qualified TO Contractor which will include the proposed team of Key Personnel defined in Sections 2.15. The TO Contractor's Key Personnel (Project Manager (PMP), Integration Specialist, Testing Specialist, and Web Designer) proposed in each TO Proposal shall be present at orals presentation to be interviewed. These Key Personnel shall meet minimum qualifications in Section 2.15.
- D. Qualifying TO Contractor will asked during the interview process to demonstrate and/or speak to their processes for dealing with the challenges of Managing Source Code, Quality Assurance, and Release Management using team foundation server.
- E. Qualified TO Financial Proposals will be reviewed and ranked from lowest to highest price proposed. A Best and Final Offer may be requested.
- F. The most advantageous TO Proposal offer considering technical and financial submission shall be selected for the work assignment. In making this selection, technical merit has greater weight than price.

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 NTP authorized by the TO Procurement Officer.

ATTACHMENT 1 - PRICE PROPOSAL

PRICE PROPOSAL FOR CATS+ TORFP # R00B4400006 LABOR CATEGORIES

(Indefinite Delivery Indefinite Quantity / Time and Materials)

The total hours listed below are to be considered as the not-to-exceed amount for the contract year and not to be construed as guaranteed billable hours. Actual compensation will be based on the total hours performed on production issues and approved WOs.

A year for this task order shall be calculated as one calendar year from NTP. Labor Rate Maximums: The maximum labor rate that may be proposed for any CATS+ Labor Category shall not exceed the maximum for the CATS+ Master Contract year in effect on the TO Proposal due date.

Year 1

		A	B	C	D
Reference Number	Labor Classification	CATS+ Labor Category	Full Loaded Hourly Labor Rate	Not to Exceed Hours	Total Proposed TORFP Price
2.8.2	IT Professional		\$	2200	\$
2.8.3	Software Engineer		\$	2200	\$
2.8.4	Web Developer		\$	2200	\$
2.8.5	Testing Specialist		\$	2200	\$
2.8.6	Project Manager (PMP)		\$	2200	\$
2.8.7	Web Designer		\$	2200	\$
2.8.8	Integration Specialist		\$	2200	\$
2.8.9	Documentation Specialist		\$	2200	\$
Year-1 Total Evaluated price					\$

Year 2 (optional)

		A	B	C	D
Reference Number	Labor Classification	CATS+ Labor Category	Full Loaded Hourly Labor Rate	Not to Exceed Hours	Total Proposed TORFP Price
2.8.2	IT Professional		\$	2200	\$
2.8.3	Software Engineer		\$	2200	\$
2.8.4	Web Developer		\$	2200	\$
2.8.5	Testing Specialist		\$	2200	\$
2.8.6	Project Manager (PMP)		\$	2200	\$
2.8.7	Web Designer		\$	2200	\$
2.8.8	Integration Specialist		\$	2200	\$
2.8.9	Documentation Specialist		\$	2200	\$
Year-2 Total Evaluated price					\$

Year 3 (optional)

		A	B	C	D
Reference Number	Labor Classification	Projected Labor Category	Full Loaded Hourly Labor Rate	Not to Exceed Hours	Total Proposed TORFP Price
2.8.2	IT Professional		\$	2200	\$
2.8.3	Software Engineer		\$	2200	\$
2.8.4	Web Developer		\$	2200	\$
2.8.5	Testing Specialist		\$	2200	\$
2.8.6	Project Manager (PMP)		\$	2200	\$
2.8.7	Web Designer		\$	2200	\$
2.8.8	Integration Specialist		\$	2200	\$
2.8.9	Documentation Specialist		\$	2200	\$
Year-3 Total Evaluated price					\$

Year 4 (optional)

		A	B	C	D
Reference Number	Labor Classification	Projected Labor Category	Full Loaded Hourly Labor Rate	Not to Exceed Hours	Total Proposed TORFP Price
2.8.2	IT Professional		\$	2200	\$
2.8.3	Software Engineer		\$	2200	\$
2.8.4	Web Developer		\$	2200	\$
2.8.5	Testing Specialist		\$	2200	\$
2.8.6	Project Manager (PMP)		\$	2200	\$
2.8.7	Web Designer		\$	2200	\$
2.8.8	Integration Specialist		\$	2200	\$
2.8.9	Documentation Specialist		\$	2200	\$
Year-4 Total Evaluated price					\$

Year 5 (optional)

		A	B	C	D
Reference Number	Labor Classification	Projected Labor Category	Full Loaded Hourly Labor Rate	Not to Exceed Hours	Total Proposed TORFP Price
2.8.2	IT Professional		\$	2200	\$
2.8.3	Software Engineer		\$	2200	\$
2.8.4	Web Developer		\$	2200	\$
2.8.5	Testing Specialist		\$	2200	\$
2.8.6	Project Manager (PMP)		\$	2200	\$
2.8.7	Web Designer		\$	2200	\$
2.8.8	Integration Specialist		\$	2200	\$
2.8.9	Documentation Specialist		\$	2200	\$
Year-5 Total Evaluated price					\$

SUMMARY PRICE PROPOSAL

CATS+ TORFP MARS O&M

Carry forward the Total Evaluated Price recorded for each of the TORFP years reported on the previous two pages and provide the sum total as the TOTAL EVALUATED PRICE

Year-1 Total Evaluated price	\$
Option years	
Year-2 Total Evaluated Price	\$
Year-3 Total Evaluated Price	\$
Year-4 Total Evaluated Price	\$
Year-5 Total Evaluated Price	\$
Total Evaluated Price	\$

Authorized Individual Name

Company Name

Title

Company Tax ID #

Signature

Date

The Hourly Labor Rate is the actual rate the State will pay for services and must be recorded in dollars and cents. The Hourly Labor Rate cannot exceed the Master Contract Rate, but may be lower, and must include all direct and indirect costs and profit for the Master Contractor to perform under the TO Agreement. Time for travel will be reimbursed as allowed in Section 2.2.4 of the Master Contract.

SUBMIT WITH THE TO FINANCIAL PROPOSAL

ATTACHMENT 2 – MINORITY BUSINESS ENTERPRISE FORMS

TO CONTRACTOR MINORITY BUSINESS ENTERPRISE REPORTING REQUIREMENTS

CATS+ TORFP # R00B4400006

These instructions are meant to accompany the customized reporting forms sent to you by the TO Manager. If, after reading these instructions, you have additional questions or need further clarification, please contact the TO Manager immediately.

1. As the TO Contractor, you have entered into a TO Agreement with the State of Maryland. As such, your company/firm is responsible for successful completion of all deliverables under the contract, including your commitment to making a good faith effort to meet the MBE participation goal(s) established for TORFP. Part of that effort, as outlined in the TORFP, includes submission of monthly reports to the State regarding the previous month's MBE payment activity. Reporting forms D-5 (TO Contractor Paid/Unpaid MBE Invoice Report) and D-6 (Subcontractor Paid/Unpaid MBE Invoice Report) are attached for your use and convenience.
2. The TO Contractor must complete a separate Form D-5 for each MBE subcontractor for each month of the contract and submit one copy to each of the locations indicated at the bottom of the form. The report is due no later than the 15th of the month following the month that is being reported. For example, the report for January's activity is due no later than the 15th of February. With the approval of the TO Manager, the report may be submitted electronically. Note: Reports are required to be submitted each month, regardless of whether there was any MBE payment activity for the reporting month.
3. The TO Contractor is responsible for ensuring that each subcontractor receives a copy (e-copy of and/or hard copy) of Form D-6. The TO Contractor should make sure that the subcontractor receives all the information necessary to complete the form properly, i.e., all of the information located in the upper right corner of the form. It may be wise to customize Form D-6 (upper right corner of the form) for the subcontractor the same as the Form D-5 was customized by the TO Manager for the benefit of the TO Contractor. This will help to minimize any confusion for those who receive and review the reports.
4. It is the responsibility of the TO Contractor to make sure that all subcontractors submit reports no later than the 15th of each month, regardless of whether there was any MBE payment activity for the reporting month. Actual payment data is verified and entered into the State's financial management tracking system from the subcontractor's D-6 report only. Therefore, if the subcontractor(s) do not submit their D-6 payment reports, the TO Contractor cannot and will not be given credit for subcontractor payments, regardless of the TO Contractor's proper submission of Form D-5. The TO Manager will contact the TO Contractor if reports are not received each month from either the prime contractor or any of the identified subcontractors. The TO Contractor must promptly notify the TO Manager if, during the course of the contract, a new MBE subcontractor is utilized. Failure to comply with the MBE contract provisions and reporting requirements may result in sanctions, as provided by COMAR 21.11.03.13.

Attachment D-1
MDOT Certified MBE Utilization and Fair Solicitation Affidavit
(Submit with bid or offer)

This document **MUST BE** included with the bid or offer. If the Bidder or Offeror fails to complete and submit this form with the bid or offer as required, the procurement officer shall deem the bid non-responsive or shall determine that the offer is not reasonably susceptible of being selected for award.

In conjunction with the bid or offer submitted in response to Solicitation No. _____, I affirm the following:

1. I acknowledge and intend to meet the overall certified Minority Business Enterprise (MBE) participation goal of ____ percent and, if specified in the solicitation, the following sub goals (complete for only those sub goals that apply):
- | | |
|--------------------------------|-----------------------------|
| ____ percent African American | ____ percent Asian American |
| ____ percent Hispanic American | ____ percent Woman-Owned |
- Therefore, I will not be seeking a waiver pursuant to COMAR 21.11.03.11.

OR

- I conclude that I am unable to achieve the MBE participation goal and/or subgoals. I hereby request a waiver, in whole or in part, of the overall goal and/or subgoals. Within 10 business days of receiving notice that our firm is the apparent awardee, I will submit all required waiver documentation in accordance with COMAR 21.11.03.11.
2. I understand that if I am notified that I am the apparent awardee of a TORFP, I must submit the following additional documentation as directed in the TORFP.
- (a) MBE Participation Schedule (D-2)
 - (b) Outreach Efforts Compliance Statement (D-3)
 - (c) Subcontractor Project Participation Certification (D-4)
 - (d) Any other documentation, including D-7 waiver documentation, if applicable, required by the Procurement Officer to ascertain bidder or offeror responsibility in connection with the certified MBE participation goal.

I understand that if I fail to return each completed document within the required time, the Procurement Officer may determine that I am not responsible and therefore not eligible for contract award. If the contract has already been awarded, the award is voidable.

3. In the solicitation of subcontract quotations or offers, MBE subcontractors were provided not less than the same information and amount of time to respond as were non-MBE subcontractors.
4. Set forth below are the (i) certified MBEs I intend to use and (ii) the percentage of the total contract amount allocated to each MBE for this project and the items of work each MBE will provide under the contract. I hereby affirm that the MBE firms are only providing those items of work for which they are MDOT certified.

I solemnly affirm under the penalties of perjury that the contents of this Affidavit are true to the best of my knowledge, information, and belief.

Bidder/Offeror Name
(PLEASE PRINT OR TYPE)

Signature of Affiant

Name: _____

Title: _____

Date: _____

SUBMIT THIS AFFIDAVIT WITH MASTER CONTRACT PROPOSAL

**Attachment D-2
MBE Participation Schedule**

Prime Contractor: (Firm Name, Address, Phone)	Project Description:
Project Number:	

List Information For Each Certified MBE Subcontractor On This Project

Minority Firm Name	MBE Certification Number
FEIN Identify the Applicable Certification Category (For Dually Certified Firms, Check Only One Category)	
<input type="checkbox"/> African American <input type="checkbox"/> Asian American <input type="checkbox"/> Hispanic American <input type="checkbox"/> Woman-Owned <input type="checkbox"/> Other	
Percentage of Total Contract Value to be provided by this MBE _____%	
Description of Work to Be Performed:	
Minority Firm Name	MBE Certification Number
FEIN Identify the Applicable Certification Category (For Dually Certified Firms, Check Only One Category)	
<input type="checkbox"/> African American <input type="checkbox"/> Asian American <input type="checkbox"/> Hispanic American <input type="checkbox"/> Woman-Owned <input type="checkbox"/> Other	
Percentage of Total Contract Value to be provided by this MBE _____%	
Description of Work to Be Performed:	
Minority Firm Name	MBE Certification Number
FEIN Identify the Applicable Certification Category (For Dually Certified Firms, Check Only One Category)	
<input type="checkbox"/> African American <input type="checkbox"/> Asian American <input type="checkbox"/> Hispanic American <input type="checkbox"/> Woman-Owned <input type="checkbox"/> Other	
Percentage of Total Contract Value to be provided by this MBE _____%	
Description of Work to Be Performed:	
Minority Firm Name	MBE Certification Number
FEIN Identify the Applicable Certification Category (For Dually Certified Firms, Check Only One Category)	
<input type="checkbox"/> African American <input type="checkbox"/> Asian American <input type="checkbox"/> Hispanic American <input type="checkbox"/> Woman-Owned <input type="checkbox"/> Other	
Percentage of Total Contract Value to be provided by this MBE _____%	
Description of Work to Be Performed:	

Continue on a separate page, if needed.

SUMMARY

Total <i>African-American</i> MBE Participation:	_____ %
Total <i>Asian American</i> MBE Participation:	_____ %
Total <i>Hispanic American</i> MBE Participation:	_____ %
Total Woman-Owned MBE Participation:	_____ %
Total <i>Other</i> Participation:	_____ %
Total All MBE Participation:	_____ %

I solemnly affirm under the penalties of perjury that the contents of this Affidavit are true to the best of my knowledge, information, and belief.

Bidder/Offeror Name
(PLEASE PRINT OR TYPE)

Signature of Affiant

Name: _____
Title: _____
Date: _____

**SUBMIT THIS AFFIDAVIT WITH TORFP
BID/PROPOSAL**

**Attachment D-3
Outreach Efforts Compliance Statement**

Complete and submit this form within 10 working days of notification of apparent award or actual award, whichever is earlier.

In conjunction with the bid or offer submitted in response to Solicitation No. _____, Bidder/Offeror states the following:

1. Bidder/Offeror identified opportunities to subcontract in these specific work categories.
2. Attached to this form are copies of written solicitations (with bidding instructions) used to solicit MDOT certified MBEs for these subcontract opportunities.
3. Bidder/Offeror made the following attempts to contact personally the solicited MDOT certified MBEs.
4. Select ONE of the following:
 - a. This project does not involve bonding requirements.

OR

 - b. Bidder/Offeror assisted MDOT certified MBEs to fulfill or seek waiver of bonding requirements (*describe efforts*).
5. Select ONE of the following:
 - a. Bidder/Offeror did/did not attend the pre-bid/proposal conference.

OR

 - b. No pre-bid/proposal conference was held.

Bidder/Offeror Printed Name

By: _____
Signature

Address: _____

**Attachment D-4
Subcontractor Project Participation Certification**

Please complete and submit one form for each MDOT certified MBE listed on Attachment D-1 within 10 working days of notification of apparent award.

_____ (prime contractor) has entered into a contract with
_____ (subcontractor) to provide services in connection with the Solicitation described below.

Prime Contractor Address and Phone	Project Description
Project Number	Total Contract Amount \$
Minority Firm Name	MBE Certification Number
Work To Be Performed	
Percentage of Total Contract	

The undersigned Prime Contractor and Subcontractor hereby certify and agree that they have fully complied with the State Minority Business Enterprise law, State Finance and Procurement Article §14-308(a)(2), Annotated Code of Maryland which provides that, except as otherwise provided by law, a contractor may not identify a certified minority business enterprise in a bid or proposal and:

- (1) fail to request, receive, or otherwise obtain authorization from the certified minority business enterprise to identify the certified minority business enterprise in its bid or proposal;
- (2) fail to notify the certified minority business enterprise before execution of the contract of its inclusion of the bid or proposal;
- (3) fail to use the certified minority business enterprise in the performance of the contract; or
- (4) pay the certified minority business enterprise solely for the use of its name in the bid or proposal.

PRIME CONTRACTOR SIGNATURE

SUBCONTRACTOR SIGNATURE

By: _____
Name, Title
Date

By: _____
Name, Title
Date

This form is to be completed monthly by the prime

Attachment D-5
Maryland Department of Information Technology
Minority Business Enterprise Participation
Prime Contractor Paid/Unpaid MBE Invoice Report

Report #: _____ Reporting Period (Month/Year): _____ Report is due to the MBE Officer by the 10th of the month following the month the services were provided. Note: Please number reports in sequence	Contract #: _____ Contracting Unit: _____ Contract Amount: _____ MBE Subcontract Amt: _____ Project Begin Date: _____ Project End Date: _____ Services Provided: _____
--	--

Prime Contractor:		Contact Person:																																					
Address:																																							
City:		State:	ZIP:																																				
Phone:	FAX:	Email:																																					
Subcontractor Name:		Contact Person:																																					
Phone:	FAX:																																						
Subcontractor Services Provided:																																							
List all payments made to MBE subcontractor named above during this reporting period: <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;"></th> <th style="width: 40%; text-align: center;"><u>Invoice#</u></th> <th style="width: 50%; text-align: center;"><u>Amount</u></th> </tr> </thead> <tbody> <tr><td>1.</td><td></td><td></td></tr> <tr><td>2.</td><td></td><td></td></tr> <tr><td>3.</td><td></td><td></td></tr> <tr><td>4.</td><td></td><td></td></tr> <tr> <td colspan="2">Total Dollars Paid: \$</td> <td>_____</td> </tr> </tbody> </table>			<u>Invoice#</u>	<u>Amount</u>	1.			2.			3.			4.			Total Dollars Paid: \$		_____	List dates and amounts of any outstanding invoices: <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;"></th> <th style="width: 40%; text-align: center;"><u>Invoice #</u></th> <th style="width: 50%; text-align: center;"><u>Amount</u></th> </tr> </thead> <tbody> <tr><td>1.</td><td></td><td></td></tr> <tr><td>2.</td><td></td><td></td></tr> <tr><td>3.</td><td></td><td></td></tr> <tr><td>4.</td><td></td><td></td></tr> <tr> <td colspan="2">Total Dollars Unpaid: \$</td> <td>_____</td> </tr> </tbody> </table>			<u>Invoice #</u>	<u>Amount</u>	1.			2.			3.			4.			Total Dollars Unpaid: \$		_____
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4.																																							
Total Dollars Unpaid: \$		_____																																					

**If more than one MBE subcontractor is used for this contract, you must use separate D-5 forms.

****Return one copy (hard or electronic) of this form to the following addresses (electronic copy with signature and date is preferred):**

(TO MANAGER OF APPLICABLE POC NAME, TITLE) (AGENCY NAME) (ADDRESS, ROOM NUMBER) (CITY, STATE ZIP) (EMAIL ADDRESS)	(TO PROCUREMENT OFFICER OR APPLICABLE POC NAME, TITLE) (AGENCY NAME) (ADDRESS, ROOM NUMBER) (CITY, STATE ZIP) (EMAIL ADDRESS) mailto:
---	---

This form must be completed by
MBE subcontractor

Attachment D-6 Minority Business Enterprise Participation Subcontractor Paid/Unpaid MBE Invoice Report

Report#: _____ Reporting Period (Month/Year): _____ Report is due by the 10th of the month following the month the services were performed.	Contract # Contracting Unit: MBE Subcontract Amount: Project Begin Date: Project End Date: Services Provided:
---	--

MBE Subcontractor Name:																															
MDOT Certification #:																															
Contact Person:		Email:																													
Address:																															
City: Baltimore	State:	ZIP:																													
Phone:	FAX:																														
Subcontractor Services Provided:																															
List all payments received from Prime Contractor during reporting period indicated above. <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;"></th> <th style="width: 40%; text-align: center;"><u>Invoice Amt</u></th> <th style="width: 55%; text-align: center;"><u>Date</u></th> </tr> </thead> <tbody> <tr><td>1.</td><td></td><td></td></tr> <tr><td>2.</td><td></td><td></td></tr> <tr><td>3.</td><td></td><td></td></tr> <tr> <td colspan="3">Total Dollars Paid: \$ _____</td> </tr> </tbody> </table>		<u>Invoice Amt</u>	<u>Date</u>	1.			2.			3.			Total Dollars Paid: \$ _____			List dates and amounts of any unpaid invoices over 30 days old. <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;"></th> <th style="width: 40%; text-align: center;"><u>Invoice Amt</u></th> <th style="width: 55%; text-align: center;"><u>Date</u></th> </tr> </thead> <tbody> <tr><td>1.</td><td></td><td></td></tr> <tr><td>2.</td><td></td><td></td></tr> <tr><td>3.</td><td></td><td></td></tr> <tr> <td colspan="3">Total Dollars Unpaid: \$ _____</td> </tr> </tbody> </table>		<u>Invoice Amt</u>	<u>Date</u>	1.			2.			3.			Total Dollars Unpaid: \$ _____		
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3.																															
Total Dollars Paid: \$ _____																															
	<u>Invoice Amt</u>	<u>Date</u>																													
1.																															
2.																															
3.																															
Total Dollars Unpaid: \$ _____																															
Prime Contractor:		Contact Person:																													

****Return one copy of this form to the following address (electronic copy with signature & date is preferred):**

(TO MANAGER OF APPLICABLE POC NAME, TITLE) (AGENCY NAME) (ADDRESS, ROOM NUMBER) (CITY, STATE ZIP) (EMAIL ADDRESS)	(TO PROCUREMENT OFFICER OR APPLICABLE POC NAME, TITLE) (AGENCY NAME) (ADDRESS, ROOM NUMBER) (CITY, STATE ZIP) (EMAIL ADDRESS) mailto:
--	---

Signature: _____ Date: _____
(Required)

Code of Maryland Regulations (COMAR)
Title 21, State Procurement Regulations

(regarding a waiver to a Minority Business Enterprise subcontracting goal)

COMAR 21.11.03.11 - Waiver.

- A. If, for any reason, the apparent successful bidder or offeror is unable to achieve the contract goal for certified MBE participation, the bidder or offeror may request, in writing, a waiver to include the following:
- (1) A detailed statement of the efforts made to select portions of the work proposed to be performed by certified MBEs in order to increase the likelihood of achieving the stated goal;
 - (2) A detailed statement of the efforts made to contact and negotiate with certified MBEs including:
 - (a) The names, addresses, dates, and telephone numbers of certified MBEs contacted, and
 - (b) A description of the information provided to certified MBEs regarding the plans, specifications, and anticipated time schedule for portions of the work to be performed;
 - (3) As to each certified MBE that placed a subcontract quotation or offer that the apparent successful bidder or offeror considers not to be acceptable, a detailed statement of the reasons for this conclusion;
 - (4) A list of minority subcontractors found to be unavailable. This list should be accompanied by an MBE unavailability certification (MBE Attachment D6) signed by the minority business enterprise, or a statement from the apparent successful bidder or offeror that the minority business refused to give the written certification: and
 - (5) The record of the apparent successful bidder or offeror's compliance with the outreach efforts required under Regulation .09B(2)(b).
- A waiver may only be granted upon a reasonable demonstration by that MBE participation could not be obtained or could not be obtained at a reasonable price.
- If the waiver request is determined not to meet this standard, the bidder or offeror will be found non-responsive (bid) or not reasonably susceptible for award (proposal) and removed from further consideration.
- B. A waiver of a certified MBE contract goal may be granted only upon reasonable demonstration by the bidder or offeror that certified MBE participation was unable to be obtained or was unable to be obtained at a reasonable price and if the agency head or designee determines that the public interest is served by a waiver. In making a determination under this section, the agency head or designee may consider engineering estimates, catalogue prices, general market availability, and availability of certified MBEs in the area in which the work is to be performed, other bids or offers and subcontract bids or offers substantiating significant variances between certified MBE and non-

MBE cost of participation, and their impact on the overall cost of the contract to the State and any other relevant factor.

- C. An agency head may waive any of the provisions of Regulations .09-.10 for a sole source, expedited, or emergency procurement in which the public interest cannot reasonably accommodate use of those procedures.
- D. When a waiver is granted, except waivers under Section C, one copy of the waiver determination and the reasons for the determination shall be kept by the MBE Liaison Officer with another copy forwarded to the Office of Minority Affairs.

Attachment D-7
MINORITY CONTRACTOR UNAVAILABILITY CERTIFICATE

Section I (to be completed by PRIME CONTRACTOR)

I hereby certify that the firm of _____
Name of Prime Contractor)

located at _____,
(Number) (Street) (City) (State) (Zip)

on _____ contacted certified minority business enterprise, _____
(Date) (Name of Minority Business)

_____ located at _____,
(Number) (Street) (City) (State) (Zip)

seeking to obtain a bid for work/service for project number _____, project name _____

List below the type of work/ service requested:

Indicate the type of bid sought, _____. The minority business enterprise identified above is either unavailable for the work /service in relation to project number _____, or is unable to prepare a bid for the following reasons(s):

The statements contained above are, to the best of my knowledge and belief, true and accurate.

(Name) (Title)

(Number) (Street) (City) (State) (Zip)

(Signature) (Date)

Note: Certified minority business enterprise must complete Section II

Section II (to be completed by CERTIFIED MINORITY BUSINESS ENTERPRISE)

I hereby certify that the firm of _____ MBE Cert.# _____
(Name of MBE Firm)

located at _____
(Number) (Street) (City) (State) (Zip)

was offered the opportunity to bid on project number _____, ON _____
(Date)

by _____
(Prime Contractor's Name) (Prime Contractor Official's Name) (Title)

The statements contained in Section I and Section II of this document are, to the best of my knowledge and belief, true and accurate.

(Name) (Title) (Phone)

(Signature) (Fax Number)

ATTACHMENT 3 - TASK ORDER AGREEMENT

CATS+ TORFP # R00B4400006OF MASTER CONTRACT # 060B2490023

This Task Order Agreement (“TO Agreement”) is made this day of Month, 2013 by and between MASTER CONTRACTOR and the STATE OF MARYLAND, Maryland State Department of Education (MSDE).

IN CONSIDERATION of the mutual premises and the covenants herein contained and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties agree as follows:

1. Definitions. In this TO Agreement, the following words have the meanings indicated:
 - a. “Agency” means MSDE, as identified in the CATS+ TORFP # **R00B4400006**.
 - b. “CATS+ TORFP” means the Task Order Request for Proposals # **R00B4400006**, dated MONTH DAY, YEAR, including any addenda.
 - c. “Master Contract” means the CATS+ Master Contract between the Maryland Department of Information Technology and MASTER CONTRACTOR dated _____.
 - d. “TO Procurement Officer” means Dorothy M. Richburg. The Agency may change the TO Procurement Officer at any time by written notice to the TO Contractor.
 - e. “TO Agreement” means this signed TO Agreement between the MSDE and MASTER CONTRACTOR.
 - f. “TO Contractor” means the CATS+ Master Contractor awarded this TO Agreement, whose principal business address is _____.
 - g. “TO Manager” means Anthony C. Palcher of the Agency. The Agency may change the TO Manager at any time by written notice to the TO Contractor.
 - h. “TO Technical Proposal” means the TO Contractor’s technical response to the CATS+ TORFP dated date of TO Technical Proposal.
 - i. “TO Financial Proposal” means the TO Contractor’s financial response to the CATS+ TORFP dated date of TO Financial Proposal.
 - j. “TO Proposal” collectively refers to the TO Technical Proposal and TO Financial Proposal.
2. Scope of Work
 - 2.1. This TO Agreement incorporates all of the terms and conditions of the Master Contract and shall not in any way amend, conflict with or supersede the Master Contract.
 - 2.2. The TO Contractor shall, in full satisfaction of the specific requirements of this TO Agreement, provide the services set forth in Section 2 of the CATS+ TORFP. These services shall be provided in accordance with the Master Contract, this TO Agreement, and the following Exhibits, which are attached and incorporated herein by reference. If there is any conflict among the Master Contract, this TO Agreement, and these Exhibits, the terms of the Master Contract shall govern. If there is any conflict between this TO Agreement and any of these Exhibits, the following order of precedence shall determine the prevailing provision:
 - a. The TO Agreement,
 - b. Exhibit A – CATS+ TORFP
 - c. Exhibit B – TO Technical Proposal
 - d. Exhibit C – TO Financial Proposal
 - 2.3. The TO Procurement Officer may, at any time, by written order, make changes in the work within the general scope of the TO Agreement. No other order, statement or conduct of the TO Procurement Officer or any other person shall be treated as a change or entitle the TO Contractor to an equitable adjustment under this section. Except as otherwise provided in this TO Agreement, if any change under this section causes an increase or decrease in the TO Contractor’s cost of, or the time required for, the performance of any part of the work, whether or not changed by the order, an equitable adjustment in the TO Agreement price shall be

made and the TO Agreement modified in writing accordingly. The TO Contractor must assert in writing its right to an adjustment under this section within thirty (30) days of receipt of written change order and shall include a written statement setting forth the nature and cost of such claim. No claim by the TO Contractor shall be allowed if asserted after final payment under this TO Agreement. Failure to agree to an adjustment under this section shall be a dispute under the Disputes clause of the Master Contract. Nothing in this section shall excuse the TO Contractor from proceeding with the TO Agreement as changed.

3. Time for Performance.

Unless terminated earlier as provided in the Master Contract, the TO Contractor shall provide the services described in the TO Proposal and in accordance with the CATS+ TORFP on receipt of a Notice to Proceed from the TO Manager. The term of this TO Agreement is for a period of [REDACTED], commencing on the date of Notice to Proceed and terminating one calendar year from Notice to Proceed. At the sole option of the State, this TO Agreement may be extended for four (4) additional, one (1) year periods for a total TO Agreement period ending five year from the Notice to Proceed mm/dd/year.

4. Consideration and Payment

4.1 The consideration to be paid the TO Contractor shall be done so in accordance with the CATS+ TORFP and shall not exceed the total amount of the task order. Any work performed by the TO Contractor in excess of the not-to-exceed ceiling amount of the TO Agreement without the prior written approval of the TO Manager is at the TO Contractor's risk of non-payment.

4.2 Payments to the TO Contractor shall be made as outlined Section 2 of the CATS+ TORFP, but no later than thirty (30) days after the Agency's receipt of an invoice for services provided by the TO Contractor, acceptance by the Agency of services provided by the TO Contractor, and pursuant to the conditions outlined in Section 4 of this Agreement.

4.3 Each invoice for services rendered must include the TO Contractor's Federal Tax Identification Number which is [REDACTED]. Charges for late payment of invoices other than as prescribed by Title 15, Subtitle 1, of the State Finance and Procurement Article, Annotated Code of Maryland, as from time-to-time amended, are prohibited. Invoices must be submitted to the Agency TO Manager unless otherwise specified herein.

4.4 In addition to any other available remedies, if, in the opinion of the TO Procurement Officer, the TO Contractor fails to perform in a satisfactory and timely manner, the TO Procurement Officer may refuse or limit approval of any invoice for payment, and may cause payments to the TO Contractor to be reduced or withheld until such time as the TO Contractor meets performance standards as established by the TO Procurement Officer.

5. Liquidated Damages:

This contract requires the contractor to make good faith efforts to comply with the Minority Business Enterprise ("MBE") Program and contract provisions. The State and the Contractor acknowledge and agree that the State will incur damages, including but not limited to loss of goodwill, detrimental impact on economic development, and diversion of internal staff resources, if the Contractor does not make good faith efforts to comply with the requirements of the MBE Program and MBE contract provisions. The parties further acknowledge and agree that the damages the State might reasonably be anticipated to accrue as a result of such lack of compliance are difficult to ascertain with precision.

Therefore, upon a determination by the State that the Contractor failed to make good faith efforts to comply with one or more of the specified MBE Program requirements or contract provisions, the Contractor agrees to pay liquidated damages to the State at the rates set forth below. The Contractor expressly agrees that the State may withhold payment on any invoices as a set-off against liquidated damages owed. The Contractor further agrees that for each specified violation, the agreed upon liquidated damages are reasonably proximate to the loss the State is anticipated to incur as a result of such violation.

ATTACHMENT 4 - CONFLICT OF INTEREST AFFIDAVIT AND DISCLOSURE

A. "Conflict of interest" means that because of other activities or relationships with other persons, a person is unable or potentially unable to render impartial assistance or advice to the State, or the person's objectivity in performing the contract work is or might be otherwise impaired, or a person has an unfair competitive advantage.

B. "Person" has the meaning stated in COMAR 21.01.02.01B(64) and includes a bidder, Offeror, Contractor, consultant, or subcontractor or sub-consultant at any tier, and also includes an employee or agent of any of them if the employee or agent has or will have the authority to control or supervise all or a portion of the work for which a bid or offer is made.

C. The bidder or Offeror warrants that, except as disclosed in §D, below, there are no relevant facts or circumstances now giving rise or which could, in the future, give rise to a conflict of interest.

D. The following facts or circumstances give rise or could in the future give rise to a conflict of interest (explain in detail—attach additional sheets if necessary):

E. The bidder or Offeror agrees that if an actual or potential conflict of interest arises after the date of this affidavit, the bidder or Offeror shall immediately make a full disclosure in writing to the procurement officer of all relevant facts and circumstances. This disclosure shall include a description of actions which the bidder or Offeror has taken and proposes to take to avoid, mitigate, or neutralize the actual or potential conflict of interest. If the contract has been awarded and performance of the contract has begun, the Contractor shall continue performance until notified by the procurement officer of any contrary action to be taken.

I DO SOLEMNLY DECLARE AND AFFIRM UNDER THE PENALTIES OF PERJURY THAT THE CONTENTS OF THIS AFFIDAVIT ARE TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE, INFORMATION, AND BELIEF.

Date: _____ By: _____
(Authorized Representative and Affiant)

SUBMIT AS A .PDF FILE WITH TO TECHNICAL PROPOSAL

ATTACHMENT 5 - LABOR CLASSIFICATION PERSONNEL RESUME SUMMARY

INSTRUCTIONS:

1. Master Contractors must comply with all personnel requirements under the Master Contract RFP 060B2490023.
2. Only labor categories proposed in the Master Contractors Technical proposal may be proposed under the CATS+ TORFP process.
3. For each person proposed in any of the labor categories, complete one Labor Category Personnel Resume Summary to document how the proposed person meets each of the minimum requirements. The summary is required at time of submission and signed at the time of the interview.

For example: If you propose John Smith who is your subcontractor and you believe he meets the requirements of the Group Facilitator, you will complete the top section of the form by entering John Smith's name and the subcontractor's company name. You will then complete the right side of the Group Facilitator form documenting how the individual meets each of the requirements. Where there is a time requirement such as 3 months experience, you must provide the dates from and to showing an amount of time that equals or exceeds mandatory time requirement.

4. Each form also includes examples of duties to perform. The proposed person must be able to fulfill those duties.
5. For each subject matter expert, the State will identify the particular area of expertise and the Master Contractor shall provide proof the individual has qualifications within that area of expertise.
6. Additional information may be attached to each Labor Category Personnel Resume Summary that may assist a full and complete understanding of the individual being proposed.

**ATTACHMENT 5
LABOR CLASSIFICATION PERSONNEL RESUME SUMMARY
(CONTINUED)**

IT PROFESSIONAL – (INSERT LABOR CATEGORY NAME)

Instructions: Enter resume information in the fields below; do not submit other resume formats. Submit one resume for each proposed resource

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 *must be filled out. Do not enter "see resume" as a response*

Describe work experience relevant to the Duties / Responsibilities and Minimum Qualifications described in Section 2. Start with the most recent experience; do not include non-relevant experience.

[Organization] [Title / Role] [Period of Employment/Work] [Location] [Contact Person (Optional if current employer)]	Description of Work...
[Organization] [Title / Role] [Period of Employment/Work] [Location] [Contact Person (Optional if current employer)]	Description of Work...
<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>			
<add lines as needed>			
<add lines as needed>			

D. References List persons the State may contact as employment references

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

**ATTACHMENT 5
LABOR CLASSIFICATION PERSONNEL RESUME SUMMARY
(CONTINUED)**

Proposed Individual's Name/Company:	How does the proposed individual meet each requirement?
IT PROFESSIONAL	
Education/Experience: (2.16.1a) BS degree in computer science or five (5) years of direct experience supporting a Data Center running Microsoft Active Directory, IIS, Microsoft Exchange, and Windows Enterprise editions of Microsoft SQL, Windows Server	< Document the education and /or work experience including dates and location>
Responsibilities: (2.8.2) a. Design, update, develop and administer the SQL Server Database in Test and UAT environments and provide scripts to the DBA at MSDE-OIT to manage stored procedures and field attributes to the Production SQL the as part of the upgrade and implementation of MARS and assigned WOs. b. Design and propose configuration strategies for SharePoint Service to improve searching and updates to the current documents stored in the MARS database. c. Configure, troubleshoot performance issues and maintain Microsoft Internet Information Services d. Provide configuration and workflow expertise on Microsoft Team foundation Server, Universal Access Gateway, and integrated SharePoint services for monitoring WOs and scheduled releases. e. Provide expertise for troubleshooting Microsoft Exchange Services and MARS design considerations for exploiting the latest API function for managing calendars, and email templates, and mailing lists. f. Manage data views and interfaces with existing Oracle and MS-SQL owned by MSDE.	< Document the dates and location and the candidates role in performing the duties>
Minimum Qualifications (2.16.1b – 2.16.1j) b. Three (3) years of developing and maintaining .NET custom applications on the Microsoft platform, c. Three (3) years of work experience on SQL Server Reporting Services, d. Three (3) years of direct experience writing SQL stored procedures/functions, e. Three (3) years of experience configuring and troubleshooting Microsoft IIS, f. Three (3) years of combined experience configuring	< Document the dates and location the Minimum Qualifications were met.>

<p>and troubleshooting Microsoft TFS, and Microsoft UAG.</p> <p>g. Three (3) years of combined experience configuring and troubleshooting Microsoft Exchange and Three (3) years of working with Microsoft SharePoint Services.</p> <p>h. Three (3) years of experience with SQL Server Agent.</p> <p>i. One (1) years of experience integrating data from Oracle databases to SQL server databases.</p> <p>j. One (1) years of experience working with web enabled systems that provide CRM functionality.</p>	
<p>Preferred Qualifications (2.17.1)</p> <p>a. At least one (1) year of experience on SQL Server Reporting Services (SSRS0 2005/2008)</p> <p>b. At least one (1) year of experience configuring and troubleshooting Microsoft IIS-7</p> <p>c. At least one (1) year of experience configuring and troubleshooting Microsoft TFS 2010</p> <p>d. At least one (1) year of experience configuring and troubleshooting Microsoft UAG 2007</p> <p>e. At least one (1) year of experience configuring and troubleshooting Microsoft Exchange 2010</p> <p>f. At least one (1) year of experience configuring and troubleshooting Microsoft SharePoint service 2010 and 2013 specifically in configuring and managing: collaboration, content pages, document management, and search functions.</p>	<p>< Document the dates and location the Preferred Qualifications were met.></p>

The information provided on this form for this labor class is true and correct to the best of my knowledge:

TO Contractor’s Contract Administrator:

Signature Date

Proposed Individual:

Signature Date

SUBMIT WITH TO TECHNICAL PROPOSAL
SIGNATURE REQUIRED AT THE TIME OF THE INTERVIEW

ATTACHMENT 5
LABOR CLASSIFICATION PERSONNEL RESUME SUMMARY
(CONTINUED)

SOFTWARE ENGINEER – (INSERT LABOR CATEGORY NAME)

Instructions: Enter resume information in the fields below; do not submit other resume formats. Submit one resume for each proposed resource

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 *must be filled out. Do not enter "see resume" as a response*

Describe work experience relevant to the Duties / Responsibilities and Minimum Qualifications described in Section 2. Start with the most recent experience; 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]	
[Contact Person (Optional if current employer)]	
<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>			
<add lines as needed>			
<add lines as needed>			

D. References List persons the State may contact as employment references

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

<add lines as needed>

ATTACHMENT 5
LABOR CLASSIFICATION PERSONNEL RESUME SUMMARY
(CONTINUED)

Proposed Individual's Name/Company:	How does the proposed individual meet each requirement?
SOFTWARE ENGINEER	
Education/Experience: (2.16.2a) BS in Computer Science or related field combined with three years of system design and/or programming experience; or, Five (5) years of system and/or applications programming experience.	< Document the education and /or work experience including dates and location>
Responsibilities: (2.8.3) <ul style="list-style-type: none">a. Work within the standards of the Microsoft Team Foundation server and Universal Access Gateway services hosted at MSDE.b. Develop, configuring, integrating and supporting MARS.c. Integrate MARS with other applications including the SharePoint, other content management solutionsd. Improve performance, data quality and storage; reporting capabilities; and workflow management process.e. Review, analyze and modify existing reports and applications.f. Participate in analyzing, documenting, and performing system configuration and setup as well as integration and system testing.	< Document the dates and location and the candidates role in performing the duties>
Minimum Qualifications: (2.16.2b – 2.16.2i) <ul style="list-style-type: none">b. Five (5) years of combined experience implementing business intelligence (BI) solutions on the Microsoft platform with significant experience and hands-on combined use of: ASP.Net, Java, and SQLc. One (1) years of experience programming API functions with Microsoft Office and Microsoft Exchange Serverd. Three (3) years of combined experience developing applications using advanced technologies, such as Internet protocols or web-based technology. Technologies include HTML, XML, and ASP.NET applications and SQL Reporting Services.e. Two (2) years of experience working with or supporting a COTS Library Solution internet based	< Document the dates and location the Minimum Qualifications were met.>

<p>application. (all experience must be referenced work experience and outside of training and certifications)</p> <p>f. Three (3) years of experience building and migrating application to various traditional Window devices, and tablet type platform.</p> <p>g. Three (3) years of experience with SQL/ Server 2005 (or greater) in support of data/database analysis, and data recovery/fix requirements.</p> <p>h. Two (2) years of experience with Application Lifecycle Management using Microsoft Team Foundation Server and Microsoft Unified Gateway (UAG)</p> <p>i. Two (2) years development CRM application (must be referenced experience outside of training and certifications)</p>	
<p>Preferred Qualifications: (2.17.2)</p> <p>a. At least one (1) year of experience on SQL Server Reporting Services (SSRS) 2005/2008.</p> <p>b. At least one (1) year of experience programming API functions with Microsoft Office and Microsoft Exchange Server</p> <p>c. At least one (1) year of experience working on COTS Library Solutions similar to those used by MARS (all experience must be referenced work experience and outside of training and certifications)</p> <p>d. At least one (1) year of experience with Application Lifecycle Management using Microsoft Team Foundation Server 2010 and Microsoft Unified Gateway (UAG) 2010</p>	<p>< Document the dates and location the Preferred Qualifications were met.></p>

The information provided on this form for this labor class is true and correct to the best of my knowledge:

TO Contractor’s Contract Administrator:

Signature Date

Proposed Individual:

Signature Date

SUBMIT WITH TO TECHNICAL PROPOSAL
SIGNATURE REQUIRED AT THE TIME OF THE INTERVIEW

ATTACHMENT 5
LABOR CLASSIFICATION PERSONNEL RESUME SUMMARY
 (CONTINUED)

WEB DEVELOPER – (INSERT LABOR CATEGORY NAME)

Instructions: Enter resume information in the fields below; do not submit other resume formats. Submit one resume for each proposed resource

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 *must be filled out. Do not enter “see resume” as a response*

Describe work experience relevant to the Duties / Responsibilities and Minimum Qualifications described in Section 2. Start with the most recent experience; do not include non-relevant experience.

[Organization] [Title / Role] [Period of Employment/Work] [Location] [Contact Person (Optional if current employer)]	Description of Work...
[Organization] [Title / Role] [Period of Employment/Work] [Location] [Contact Person (Optional if current employer)]	Description of Work...
<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>			
<add lines as needed>			
<add lines as needed>			

D. References List persons the State may contact as employment references

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

**ATTACHMENT 5
LABOR CLASSIFICATION PERSONNEL RESUME SUMMARY
(CONTINUED)**

Proposed Individual's Name/Company:	How does the proposed individual meet each requirement?
WEB DEVELOPER	
<p>Education/Experience: (2.16.3a) Five (5) years of web development programming experience or a BS in Computer Science or related field AND three years of web development programming experience.</p>	<p>< Document the education and /or work experience including dates and location></p>
<p>Responsibilities: (2.8.4)</p> <ol style="list-style-type: none"> a. Architect, design and develop SharePoint implementations using best practices. b. Maintain web data collections of timely and sensitive materials c. Implement and customize SharePoint-based solutions. d. Implement SharePoint-based workflows. e. Perform Microsoft .NET development to extend and augment the SharePoint platform. f. Manage browser compatibility. g. Developed solutions to web user ergonomics and Web Standards. h. Design and develop and improve active dashboards to provide summary information. 	<p>< Document the dates and location and the candidates role in performing the duties></p>
<p>Minimum Qualifications: (2.16.3b – 2.16.3c)</p> <ol style="list-style-type: none"> b. Five (5) years of experience designing, developing, maintaining, and deploying website applications, including product selection, configuration, installation, maintenance, and site specific under the .NET framework using ASP.NET, and Microsoft SQL Reporting Services, and Microsoft SQL relational databases. c. Three (3) years of experience designing portal websites, using Secure Socket Layer (SSL) and role based security. d. Three (3) years of experience incorporating Active Directory Services into web-based application. e. Two (2) years of experience integrating applications with Microsoft SharePoint server including: content management, search criteria, and document management. 	<p>< Document the dates and location the Minimum Qualifications were met.></p>

<ul style="list-style-type: none"> f. Two (2) years of experience with Application Lifecycle Management using Microsoft Team Foundation Server g. Three (3) years of combined experience in Technologies that must include SharePoint, Microsoft SQL, Microsoft .NET Framework, and Visual Studio h. Two (2) years of experience integrating CRM type functionality and maintaining COTS Library solutions (must be referenced experience outside of training and certifications) 	
<p>Preferred Qualifications: (2.17.3)</p> <ul style="list-style-type: none"> a. At least one (1) year of experience integrating active dashboard designs into summary web pages b. At least one (1) year of experience integrating applications with Microsoft SharePoint 2010 server including: content management, search criteria, and document management. c. At least one (1) year of experience in Technologies that must include SharePoint 2010/2013, SQL 2008/2012, .NET 3.5/4.0 Frameworks, Visual Studio 2010/2012. 	<p>< Document the dates and location the Preferred Qualifications were met.></p>

The information provided on this form for this labor class is true and correct to the best of my knowledge:

TO Contractor’s Contract Administrator:

Signature Date

Proposed Individual:

Signature Date

SUBMIT WITH TO TECHNICAL PROPOSAL
SIGNATURE REQUIRED AT THE TIME OF THE INTERVIEW

ATTACHMENT 5
LABOR CLASSIFICATION PERSONNEL RESUME SUMMARY
 (CONTINUED)

TESTING SPECIALIST (Key Personnel) – (INSERT LABOR CATEGORY NAME)

Instructions: Enter resume information in the fields below; do not submit other resume formats. Submit one resume for each proposed resource

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 *must be filled out. Do not enter "see resume" as a response*

Describe work experience relevant to the Duties / Responsibilities and Minimum Qualifications described in Section 2. Start with the most recent experience; do not include non-relevant experience.

[Organization] [Title / Role] [Period of Employment/Work] [Location] [Contact Person (Optional if current employer)]	Description of Work...
[Organization] [Title / Role] [Period of Employment/Work] [Location] [Contact Person (Optional if current employer)]	Description of Work...
<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>			
<add lines as needed>			
<add lines as needed>			

D. References List persons the State may contact as employment references

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

**ATTACHMENT 5
LABOR CLASSIFICATION PERSONNEL RESUME SUMMARY
(CONTINUED)**

Proposed Individual's Name/Company:	How does the proposed individual meet each requirement?
TESTING SPECIALIST	
<p>Education/Experience: (2.15.3a) Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or three (3) years of equivalent experience in testing internet and intranet applications.</p>	<p>< Document the education and /or work experience including dates and location></p>
<p>Responsibilities: (2.8.5)</p> <ul style="list-style-type: none"> a. Review WO requirements; prepare and review test plans and test cases; and report defects and prepare test reports. b. Design and execute IT software tests and evaluate results to ensure compliance with applicable regulations. c. Prepare test scripts and all required test documentation. d. Design and prepare all needed test data. e. Review test results and evaluate for conformance to design. f. Collaborate with a variety of stakeholders within MSDE to complete test procedures. g. Design, develop, implement and maintain test processes and test cases, including user manuals for assigned WOs. h. Perform test execution in development, test, and production environments for each build, sprint, and release in the iterative development lifecycle. i. Write test plans for assigned projects. j. Maintain record of test progress. k. Document test results. l. Prepare reports and present results as appropriate. 	<p>< Document the dates and location and the candidates role in performing the duties></p>
<p>Minimum Qualifications: (2.15.3b – 2.15.3h)</p> <ul style="list-style-type: none"> b. Three (3) years of software testing experience (integration and acceptance) on multiple projects. c. Three (3) years of experience in verification and validation, software testing and integration, software metrics, and their application to software quality assessment, and demonstrated knowledge of system and project life cycles. 	<p>< Document the dates and location the Minimum Qualifications were met.></p>

<ul style="list-style-type: none"> d. Three (3) years of experience with testing database interfaces in a multi release project environment. e. Three (3) years of experience creating development and execution of test cases for Unit Testing, User Acceptance Testing, interoperability testing, System Integration testing and Performance testing of a multi-tier Internet and Intranet Solution. f. Three (3) years of experience performing requirement analysis. g. Three (3) years of experience conducting conference calls, webinars, to review test progress, developing and providing tools to improve the system test and acceptance process. h. One (1) years of experience with Application Lifecycle Management using Microsoft Team Foundation Server, tracking bug fixes, and test results, and release management. 	
<p>Preferred Qualifications: (2.17.4)</p> <ul style="list-style-type: none"> a. At least one (1) year of experience with testing database interfaces in a multi release project environment b. At least one (1) year of experience creating development and execution of test cases for Unit Testing, Financial Systems and testing security feature to secure personal information over the web. c. At least one (1) year of experience with Application Lifecycle Management using Microsoft Team Foundation Server 2010, for release management and tracking bug fixes with SharePoint services 	<p>< Document the dates and location the Preferred Qualifications were met.></p>

The information provided on this form for this labor class is true and correct to the best of my knowledge:

TO Contractor’s Contract Administrator:

Signature Date

Proposed Individual:

Signature Date

SUBMIT WITH TO TECHNICAL PROPOSAL
SIGNATURE REQUIRED AT THE TIME OF THE INTERVIEW

ATTACHMENT 5
LABOR CLASSIFICATION PERSONNEL RESUME SUMMARY
 (CONTINUED)

PROJECT MANAGER, PMP (Key Personnel) – (INSERT LABOR CATEGORY NAME)

Instructions: Enter resume information in the fields below; do not submit other resume formats. Submit one resume for each proposed resource

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 *must be filled out. Do not enter "see resume" as a response*

Describe work experience relevant to the Duties / Responsibilities and Minimum Qualifications described in Section 2. Start with the most recent experience; do not include non-relevant experience.

[Organization] [Title / Role] [Period of Employment/Work] [Location] [Contact Person (Optional if current employer)]	Description of Work...
[Organization] [Title / Role] [Period of Employment/Work] [Location] [Contact Person (Optional if current employer)]	Description of Work...
<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>			
<add lines as needed>			
<add lines as needed>			

D. References List persons the State may contact as employment references

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

ATTACHMENT 5
LABOR CLASSIFICATION PERSONNEL RESUME SUMMARY
(CONTINUED)

Proposed Individual's Name/Company:	How does the proposed individual meet each requirement?
PROJECT MANAGER (PMP)	
Education/Experience: (2.15.1a) Provide proof of current PMP certification.	< Document the PMP number, and date of certification>
Responsibilities: (2.8.6) a. Be the primary point of contact for issue reporting, and WO progress. b. Be responsible for submitting bi-weekly status reports. c. Manage TO Contractor Resource. d. Provide bi-weekly updated schedules. e. Develop and maintain project management plan and related articles including risk and issue management. f. Attend status bi-weekly status meeting. g. Interact weekly with the MARS Project Manager on mitigating issues.	< Document the dates and location and the candidates role in performing the duties>
Minimum Qualifications: (2.15.1b – 2.15.1c) b. Five (5) years of experience managing, project life cycles, risk, resources, schedules, and oversight of internet and intranet software operation and support projects. c. Three (3) years of experience as an application programmer on large-scale IT projects, knowledge of computer equipment, and ability to develop complex software to satisfy design objectives. d. Three (3) years of experience managing internet projects for government agencies in a multi-tier environment. e. Three (3) years of experience using this Microsoft Project, Microsoft SharePoint, Microsoft Office, and Adobe. f. Three (3) years of experience with Application Lifecycle Management within Microsoft Team Foundation Server.	< Document the dates and location the Minimum Qualifications were met.>
Preferred Qualifications: (2.17.5) a. Shall provide proof of at least two (2) years PMP certification and must provide the expiration date the certificate. If the certification is up for renewal in less than 14 months then the TO Contractor must show the number of Personal Development Units	< Document the dates and location the Preferred Qualifications were met.>

(PDU) approved by PMI for recertification. b. At least one (1) year of experience using this Microsoft Project 2010, Microsoft SharePoint 2010, Microsoft Office 2007-2013, and Adobe electronic signatures.	
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The information provided on this form for this labor class is true and correct to the best of my knowledge:

TO Contractor’s Contract Administrator:

Signature

Date

Proposed Individual:

Signature

Date

SUBMIT WITH TO TECHNICAL PROPOSAL
SIGNATURE REQUIRED AT THE TIME OF THE INTERVIEW

ATTACHMENT 5
LABOR CLASSIFICATION PERSONNEL RESUME SUMMARY
 (CONTINUED)

WEB DESIGNER (Key Personnel) – (INSERT LABOR CATEGORY NAME)

Instructions: Enter resume information in the fields below; do not submit other resume formats. Submit one resume for each proposed resource

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 *must be filled out. Do not enter "see resume" as a response*

Describe work experience relevant to the Duties / Responsibilities and Minimum Qualifications described in Section 2. Start with the most recent experience; do not include non-relevant experience.

[Organization] [Title / Role] [Period of Employment/Work] [Location] [Contact Person (Optional if current employer)]	Description of Work...
[Organization] [Title / Role] [Period of Employment/Work] [Location] [Contact Person (Optional if current employer)]	Description of Work...
<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>			
<add lines as needed>			
<add lines as needed>			

D. References List persons the State may contact as employment references

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

ATTACHMENT 5
LABOR CLASSIFICATION PERSONNEL RESUME SUMMARY
(CONTINUED)

Proposed Individual's Name/Company:	How does the proposed individual meet each requirement?
WEB DESIGNER	
Education/ Experience: (2.15.4a) BS in Computer Science or related field AND three years of system and/or programming experience; OR, five (5) years of programming and web page design experience.	< Document the education and /or work experience including dates and location>
Responsibilities: (2.8.7) a. Produce visual designs, and layouts that will lead web users through the complex business processes that make up MARS based on web standards b. Develop web pages and mock up based on Web Standards, Internet Browser Capabilities. c. Interact with MSDE Stakeholder on both technical and non-technical design issues. d. Design pages for locating site and producing direction using Google Maps. e. Trouble shoots issues with design and improves the customer web experience with MARS. f. Enhance designs to improve user experience, search engine optimization, and website maintenance g. Develops site navigation by categorizing content; funneling traffic through content h. Produce pre-design where appropriate utilizing storyboarding and graphics. i. Maintains site appearance by collaborating with MSDE-OIT on developing processes for enforcing content and display standards; editing submissions.	< Document the dates and location and the candidates role in performing the duties>
Minimum Qualifications: (2.15.4b – 2.15.4i) b. Qualified candidates will be asked to provide statistic or live demonstrations of their work. Samples of their work shall be presented during the oral presentation and interview process. The work shall demonstrate strong Visual Design and layout skill set, with an understanding of Web Standards, Internet Browser capabilities, and communication skills to both technical and non-technical stakeholders. c. Two (2) years of experience working interfacing with driving directions and Google Maps based on Search results, SQL search strings d. Three (3) years of experience programming and designing solutions using IIS.	< Document the dates and location the Minimum Qualifications were met.>

<ul style="list-style-type: none"> e. Two (2) years of experience designing website using ASP.Net, HTML,XML, CSS, and JavaScript. f. Two (2) years of experience working with SharePoint Designer, and Microsoft Visual Studio. g. Two (2) years of experience designing and implementing dashboards, workflow, graphics, templates, layouts, themes, typography, and visual standards. h. One (1) year of experience as the lead designer of an intranet and internet web based applications providing: mockups, and manage design documentation, style guides, and specifications. i. One (1) year of experience with Application Lifecycle Management using Microsoft Team Foundation Server tracking bug fixes, and test results, and release management. 	
<p>Preferred Qualifications: (2.17.6)</p> <ul style="list-style-type: none"> a. The TO Contractor shall include samples of work that demonstrates the proposed candidates understanding of web standards, design considerations for complex information gathering and for processing of sensitive/secure information over the web b. One (1) year of experience redesigning websites from the initial concept, impact, to release. c. One (1) year of experience integrating SharePoint services into an existing website. 	<p>< Document the dates and location the Preferred Qualifications were met.></p>

The information provided on this form for this labor class is true and correct to the best of my knowledge:

TO Contractor’s Contract Administrator:

Signature Date

Proposed Individual:

Signature Date

SUBMIT WITH TO TECHNICAL PROPOSAL
SIGNATURE REQUIRED AT THE TIME OF THE INTERVIEW

ATTACHMENT 5
LABOR CLASSIFICATION PERSONNEL RESUME SUMMARY
 (CONTINUED)

INTEGRATION SPECIALIST (Key Personnel) – (INSERT LABOR CATEGORY NAME)

Instructions: Enter resume information in the fields below; do not submit other resume formats. Submit one resume for each proposed resource

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 *must be filled out. Do not enter “see resume” as a response*

Describe work experience relevant to the Duties / Responsibilities and Minimum Qualifications described in Section 2. Start with the most recent experience; do not include non-relevant experience.

[Organization] [Title / Role] [Period of Employment/Work] [Location] [Contact Person (Optional if current employer)]	Description of Work...
[Organization] [Title / Role] [Period of Employment/Work] [Location] [Contact Person (Optional if current employer)]	Description of Work...
<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>			
<add lines as needed>			
<add lines as needed>			

D. References List persons the State may contact as employment references

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

ATTACHMENT 5
LABOR CLASSIFICATION PERSONNEL RESUME SUMMARY
(CONTINUED)

Proposed Individual's Name/Company:	How does the proposed individual meet each requirement?
INTEGRATION SPECIALIST	
Education/Experience: (2.15.2a) BS in Computer Science or related field AND three years of integrating applications; OR, Five (5) years of managing integration and deployment of Intranet and web portals.	< Document the education and /or work experience including dates and location>
Responsibilities: (2.8.8) a. Manage scheduled releases b. Coordinate system testing, user acceptance testing, and production release. c. Provide communications on the status of release and what is included with the release d. Validate the completeness of all development efforts prior to release. e. Coordinate any intervention need with MSDE/OIT to complete the release to production including submitting stored procedures and scripts in advance for review by MSDE/OIT. f. Develop and maintain project management plan and related articles including risk and issue management. g. Validate when the release efforts have been completed, and report and issues h. Refine release processes based on lessons learned.	< Document the dates and location and the candidates role in performing the duties>
Minimum Qualifications : (2.15.2b – 2.15.2f) b. Three (3) years of experience as the primary contact point for planning Software Integration, executing release strategies, and validating completion of software releases. c. Three (3) years of experience managing and assigning WO to developers and measuring their progress. d. Three (3) years, completing design documents, managing a team of developers, performing maintenance and new development using ASP.Net solutions in a Microsoft Team Foundation Server environment. e. Three (3) years of experience installing and maintaining IIS 7 configuration and related services. f. Three (3) years of experience using Application Lifecycle Management techniques release	< Document the dates and location the Minimum Qualifications were met.>

management and issue management, tracking bug fixes, and system testing, using Microsoft Team Foundation Server.	
Preferred Qualifications: (2.17.7) a. At least one (1) year of experience managing releases using .NET 3.0-4.0 framework. b. At least one (1) year of experience managing, Test and Production releases using Team Foundation Server 2010 environment and Microsoft Universal Access Gateway 2010 tracking bug fixes, and test results, and release management.	< Document the dates and location the Preferred Qualifications were met.>

The information provided on this form for this labor class is true and correct to the best of my knowledge:

TO Contractor’s Contract Administrator:

Signature Date

Proposed Individual:

Signature Date

SUBMIT WITH TO TECHNICAL PROPOSAL
SIGNATURE REQUIRED AT THE TIME OF THE INTERVIEW

ATTACHMENT 5
LABOR CLASSIFICATION PERSONNEL RESUME SUMMARY
 (CONTINUED)

DOCUMENTATION SPECIALIST – (INSERT LABOR CATEGORY NAME)

Instructions: Enter resume information in the fields below; do not submit other resume formats. Submit one resume for each proposed resource

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 *must be filled out. Do not enter “see resume” as a response*

Describe work experience relevant to the Duties / Responsibilities and Minimum Qualifications described in Section 2. Start with the most recent experience; do not include non-relevant experience.

[Organization] [Title / Role] [Period of Employment/Work] [Location] [Contact Person (Optional if current employer)]	Description of Work...
[Organization] [Title / Role] [Period of Employment/Work] [Location] [Contact Person (Optional if current employer)]	Description of Work...
<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>			
<add lines as needed>			
<add lines as needed>			

D. References List persons the State may contact as employment references

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

ATTACHMENT 5
LABOR CLASSIFICATION PERSONNEL RESUME SUMMARY
(CONTINUED)

Proposed Individual's Name/Company:	How does the proposed individual meet each requirement?
DOCUMENTATION SPECIALIST	
Education/Experience: (2.16.4a) Three (3) years of combined experience performing system requirements analysis, quality assurance, system integration.	< Document the education and /or work experience including dates and location>
Responsibilities: (2.8.9) a. Candidates will meet with developers, stakeholders, end users, and managers to interview them regarding a specific process. b. Create design documents, user documents, online help documents, and related deliverables using Microsoft Office, Visio 2010. c. Participate in requirement gathering efforts and documenting business requirements and specifications for software application development. d. Develop and manage help content, formal training materials, content pages, testing plans, training materials, technical design documents and training scripts as needed. e. Manage and design SharePoint solutions for storing reference materials and related WO articles. f. Update articles stored in Microsoft Team Foundation Server 2010 related to tracking bug fixes, and test results, and release management.	< Document the dates and location and the candidates role in performing the duties>
Minimum Qualifications: (2.16.4b – 2.16.4f) b. Three (3) years of combined experience building design documents, end-user requirement documentation, end-user testing documents, system test cases, technical and design documents using Microsoft Office, and Visio c. Two (2) years of experience gathering and documenting business processed and specifications for software application development d. Two (2) years of experience help content, formal training materials, content management, testing plans, training materials, technical design documents and training scripts e. Two (2) years of experience managing and designing SharePoint solutions for storing reference materials f. One (1) years of experience with Application	< Document the dates and location the Minimum Qualifications were met.>

ATTACHMENT 6 - DIRECTIONS TO THE PRE-TO PROPOSAL CONFERENCE

Maryland State Department Of Education
Friday, February 7, 2014 @ 10:00 AM ET
Nancy S Grasmick State Education Building
8th Floor, CR 6/7
200 West Baltimore Street
Baltimore, MD 21201

From Interstate 95 (Washington, D. C.)

95 to Exit 53 – “Route 395 North/Downtown”. On 395, take exit “Downtown/Inner Harbor”, which is the left lane. Stay in left lane. “Downtown/Inner Harbor” exit becomes Howard Street. Cross Conway, Camden, and Pratt Streets. After Pratt, get in the right lane. Cross Lombard Street, turn right at next light which is Baltimore Street. You can turn right from both lanes, but the left lane of Howard Street puts you into the left lane of Baltimore Street and gives easy access to the parking lot, and directly across from the First Mariners Arena (Formerly the Baltimore Arena).

From Interstate 95 (North of Baltimore—Philadelphia/New York)

95 South to Baltimore. Pass the exits to 695 – Baltimore Beltway. As soon as you pass the 695 exits, get in the right two lanes. Stay to the right and follow signs to 95 South/Ft. McHenry Tunnel. (The left two lanes go to 895 and the “old” Harbor Tunnel.) When you exit the Ft. McHenry tunnel stay on the right and take the first exit – 395/Baltimore/Downtown. On the exit ramp you should begin to move to the left and continue to follow the signs that say “Downtown/Inner Harbor”. Downtown/Inner Harbor” exit becomes Howard Street. Cross Conway, Camden, and Pratt Streets. After Pratt, get in the right lane. Cross Lombard Street, turn right at next light which is Baltimore Street. You can turn right from both lanes, but the left lane of Howard Street puts you into the left lane of Baltimore Street and gives easy access to the parking lot next to the building. MSDE is in the middle of the block, on the left, right next to the parking lot, and directly across from the First Mariners Arena (formerly the Baltimore Arena).

From Annapolis – Route 50

Route 50 West to Route 97 North to Baltimore to exit “695 (Baltimore Beltway) West” to Baltimore. Exit 7B from the Beltway to Baltimore-Washington Parkway “295 North to Baltimore”. Follow directions below for 295 North to Baltimore.

From the Baltimore-Washington Parkway (Route 295)

295 North to Baltimore – all the way into Baltimore City. The name of the road/street changes from BW Parkway to Russell Street to Paca Street. As you come into the city you will pass the site of the new Camden Yards (Oriole Ballpark) on the right, you will cross Pratt Street, Lombard Street, and Redwood Street. At Baltimore Street turn right. Cross Eutaw Street and Howard Street. MSDE is in the middle of the block, on the left, right next to the parking lot, and directly across from the 1st Mariners Arena (Formerly the Baltimore Arena).

ATTACHMENT 7 - NON-DISCLOSURE AGREEMENT (OFFEROR)

This Non-Disclosure Agreement (the "Agreement") is made this ____ day of _____ 200_, by and between _____ (hereinafter referred to as "the OFFEROR ") and the State of Maryland (hereinafter referred to as " the State").

OFFEROR warrants and represents that it intends to submit a TO Proposal in response to CATS+ TORFP # **R00B4400006** for **TORFP Title**. In order for the OFFEROR to submit a TO Proposal, it will be necessary for the State to provide the OFFEROR with access to certain confidential information including, but not limited, to _____. All such information provided by the State shall be considered Confidential Information regardless of the form, format, or media upon which or in which such information is contained or provided, regardless of whether it is oral, written, electronic, or any other form, and regardless of whether the information is marked as "Confidential Information". As a condition for its receipt and access to the Confidential Information referenced above, OFFEROR agrees as follows:

1. OFFEROR will not copy, disclose, publish, release, transfer, disseminate or use for any purpose in any form any Confidential Information received, except in connection with the preparation of its TO Proposal.
2. Each employee or agent of the OFFEROR who receives or has access to the Confidential Information shall execute a copy of this Agreement and the OFFEROR shall provide originals of such executed Agreements to the State. Each employee or agent of the OFFEROR who signs this Agreement shall be subject to the same terms, conditions, requirements and liabilities set forth herein that are applicable to the OFFEROR.
3. OFFEROR shall return the Confidential Information to the State within five business days of the State's Notice of recommended award. If the OFFEROR does not submit a Proposal, the OFFEROR shall return the Confidential Information to **TO Procurement Officer**, MSDE on or before the due date for Proposals.
4. OFFEROR acknowledges that the disclosure of the Confidential Information may cause irreparable harm to the State and agrees that the State may obtain an injunction to prevent the disclosure, copying, or other impermissible use of the Confidential Information. The State's rights and remedies hereunder are cumulative and the State expressly reserves any and all rights, remedies, claims and actions that it may have now or in the future to protect the Confidential Information and/or to seek damages for the OFFEROR'S failure to comply with the requirements of this Agreement. The OFFEROR consents to personal jurisdiction in the Maryland State Courts.
5. In the event the State suffers any losses, damages, liabilities, expenses, or costs (including, by way of example only, attorneys' fees and disbursements) that are attributable, in whole or in part to any failure by the OFFEROR or any employee or agent of the OFFEROR to comply with the requirements of this Agreement, OFFEROR and such employees and agents of OFFEROR shall hold harmless and indemnify the State from and against any such losses, damages, liabilities, expenses, and/or costs.
6. This Agreement shall be governed by the laws of the State of Maryland.
7. OFFEROR acknowledges that pursuant to Section 11-205.1 of the State Finance and Procurement Article of the Annotated Code of Maryland, a person may not willfully make a false or fraudulent statement or representation of a material fact in connection with a procurement contract. Persons making such statements are guilty of a felony and on conviction subject to a fine of not more than \$20,000 and/or imprisonment not exceeding 5 years or both. OFFEROR further acknowledges that this Agreement is a statement made in connection with a procurement contract.
8. The individual signing below warrants and represents that they are fully authorized to bind the OFFEROR to the terms and conditions specified in this Agreement. If signed below by an individual employee or agent of the OFFEROR under Section 2 of this Agreement, such individual acknowledges that a failure to comply with the requirements specified in this Agreement may result in personal liability.

OFFEROR: _____

BY: _____

NAME: _____

TITLE: _____

ADDRESS: _____

SUBMIT AS REQUIRED IN SECTION 1.7 OF THE TORFP

ATTACHMENT 8 - NON-DISCLOSURE AGREEMENT (TO CONTRACTOR)

THIS NON-DISCLOSURE AGREEMENT (“Agreement”) is made as of this ___ day of _____, 200__, by and between the State of Maryland (“the State”), acting by and through its Maryland State Department of Education (the “Department”), and _____ (“TO Contractor”), a corporation with its principal business office located at _____ and its principal office in Maryland located at _____.

RECITALS

WHEREAS, the TO Contractor has been awarded a Task Order Agreement (the “TO Agreement”) for **TORFP Title** TORFP No. **R00B4400006** dated _____, (the “TORFP”) issued under the Consulting and Technical Services Plus procurement issued by the Department, Project Number 060B2490023; and

WHEREAS, in order for the TO Contractor to perform the work required under the TO Agreement, it will be necessary for the State to provide the TO Contractor and the TO Contractor’s employees and agents (collectively the “TO Contractor’s Personnel”) with access to certain confidential information regarding _____ (the “Confidential Information”).

NOW, THEREFORE, in consideration of being given access to the Confidential Information in connection with the TORFP and the TO Agreement, and for other good and valuable consideration, the receipt and sufficiency of which the parties acknowledge the parties do hereby agree as follows:

1. Confidential Information means any and all information provided by or made available by the State to the TO Contractor in connection with the TO Agreement, regardless of the form, format, or media on or in which the Confidential Information is provided and regardless of whether any such Confidential Information is marked as such. Confidential Information includes, by way of example only, information that the TO Contractor views, takes notes from, copies (if the State agrees in writing to permit copying), possesses or is otherwise provided access to and use of by the State in relation to the TO Agreement.
2. TO Contractor shall not, without the State’s prior written consent, copy, disclose, publish, release, transfer, disseminate, use, or allow access for any purpose or in any form, any Confidential Information provided by the State except for the sole and exclusive purpose of performing under the TO Agreement. TO Contractor shall limit access to the Confidential Information to the TO Contractor’s Personnel who have a demonstrable need to know such Confidential Information in order to perform under the TO Agreement and who have agreed in writing to be bound by the disclosure and use limitations pertaining to the Confidential Information. The names of the TO Contractor’s Personnel are attached hereto and made a part hereof as Exhibit A. Each individual whose name appears on Exhibit A shall execute a copy of this Agreement and thereby be subject to the terms and conditions of this Agreement to the same extent as the TO Contractor. TO Contractor shall update Exhibit A by adding additional names as needed, from time to time.
3. If the TO Contractor intends to disseminate any portion of the Confidential Information to non-employee agents who are assisting in the TO Contractor’s performance of the TORFP or who will otherwise have a role in performing any aspect of the TORFP, the TO Contractor shall first obtain the written consent of the State to any such dissemination. The State may grant, deny, or condition any such consent, as it may deem appropriate in its sole and absolute subjective discretion.
4. TO Contractor hereby agrees to hold the Confidential Information in trust and in strictest confidence, to adopt or establish operating procedures and physical security measures, and to take all other measures necessary to protect the Confidential Information from inadvertent release or disclosure to unauthorized third parties and to prevent all or any portion of the Confidential Information from falling into the public domain or into the possession of persons not bound to maintain the confidentiality of the Confidential Information.
5. TO Contractor shall promptly advise the State in writing if it learns of any unauthorized use, misappropriation, or disclosure of the Confidential Information by any of the TO Contractor’s Personnel or the TO Contractor’s former Personnel. TO Contractor shall, at its own expense, cooperate with the State in seeking injunctive or other equitable relief against any such person(s).
6. TO Contractor shall, at its own expense, return to the Department, all copies of the Confidential Information in its care, custody, control or possession upon request of the Department or on termination of the TO Agreement.

7. A breach of this Agreement by the TO Contractor or by the TO Contractor's Personnel shall constitute a breach of the TO Agreement between the TO Contractor and the State.
8. TO Contractor acknowledges that any failure by the TO Contractor or the TO Contractor's Personnel to abide by the terms and conditions of use of the Confidential Information may cause irreparable harm to the State and that monetary damages may be inadequate to compensate the State for such breach. Accordingly, the TO Contractor agrees that the State may obtain an injunction to prevent the disclosure, copying or improper use of the Confidential Information. The TO Contractor consents to personal jurisdiction in the Maryland State Courts. The State's rights and remedies hereunder are cumulative and the State expressly reserves any and all rights, remedies, claims and actions that it may have now or in the future to protect the Confidential Information and/or to seek damages from the TO Contractor and the TO Contractor's Personnel for a failure to comply with the requirements of this Agreement. In the event the State suffers any losses, damages, liabilities, expenses, or costs (including, by way of example only, attorneys' fees and disbursements) that are attributable, in whole or in part to any failure by the TO Contractor or any of the TO Contractor's Personnel to comply with the requirements of this Agreement, the TO Contractor shall hold harmless and indemnify the State from and against any such losses, damages, liabilities, expenses, and/or costs.
9. TO Contractor and each of the TO Contractor's Personnel who receive or have access to any Confidential Information shall execute a copy of an agreement substantially similar to this Agreement and the TO Contractor shall provide originals of such executed Agreements to the State.
10. The parties further agree that:
 - a. This Agreement shall be governed by the laws of the State of Maryland;
 - b. The rights and obligations of the TO Contractor under this Agreement may not be assigned or delegated, by operation of law or otherwise, without the prior written consent of the State;
 - c. The State makes no representations or warranties as to the accuracy or completeness of any Confidential Information;
 - d. The invalidity or unenforceability of any provision of this Agreement shall not affect the validity or enforceability of any other provision of this Agreement;
 - e. Signatures exchanged by facsimile are effective for all purposes hereunder to the same extent as original signatures; and
 - f. The Recitals are not merely prefatory but are an integral part hereof.

Contractor/Contractor's Personnel:

MSDE:

Name: _____

Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

SUBMIT AS DESCRIBED IN THE TORFP

EXHIBIT A

TO CONTRACTOR'S EMPLOYEES AND AGENTS WHO WILL BE GIVEN ACCESS TO THE CONFIDENTIAL INFORMATION

**Printed Name and Address
of Employee or Agent**

Signature

Date

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

ATTACHMENT 9 – TO CONTRACTOR SELF-REPORTING CHECKLIST

The purpose of this checklist is for CATS+ Master Contractors to self-report on adherence to procedures for task orders (TO) awarded under the CATS+ master contract. Requirements for TO management can be found in the CATS+ master contract RFP and at the TORFP level. The Master Contractor is requested to complete and return this form by the **Checklist Due Date** below. Master Contractors may attach supporting documentation as needed. Please send the completed checklist and direct any related questions to contractoversight.doit@maryland.gov with the TO number in the subject line.

Master Contractor:	
Master Contractor Contact / Phone:	
Procuring State Agency Name:	
TO Title:	
TO Number:	
TO Type (Fixed Price, T&M, or Both):	
Checklist Issue Date:	
Checklist Due Date:	
Section 1 – Task Orders with Invoices Linked to Deliverables	
A) Was the original TORFP (Task Order Request for Proposals) structured to link invoice payments to distinct deliverables with specific acceptance criteria? Yes <input type="checkbox"/> No <input type="checkbox"/> (If no, skip to Section 2.)	
B) Do TO invoices match corresponding deliverable prices shown in the accepted Financial Proposal? Yes <input type="checkbox"/> No <input type="checkbox"/> (If no, explain why) _____	
C) Is the deliverable acceptance process being adhered to as defined in the TORFP? Yes <input type="checkbox"/> No <input type="checkbox"/> (If no, explain why) _____	
Section 2 – Task Orders with Invoices Linked to Time, Labor Rates and Materials	
A) If the TO involves material costs, are material costs passed to the agency without markup by the Master Contractor? Yes <input type="checkbox"/> No <input type="checkbox"/> (If no, explain why) _____	
B) Are labor rates the same or less than the rates proposed in the accepted Financial Proposal? Yes <input type="checkbox"/> No <input type="checkbox"/> (If no, explain why) _____	
C) Is the Master Contractor providing timesheets or other appropriate documentation to support invoices? Yes <input type="checkbox"/> No <input type="checkbox"/> (If no, explain why) _____	
Section 3 – Substitution of Personnel	
A) Has there been any substitution of personnel? Yes <input type="checkbox"/> No <input type="checkbox"/> (If no, skip to Section 4.)	
B) Did the Master Contractor request each personnel substitution in writing? Yes <input type="checkbox"/> No <input type="checkbox"/> (If no, explain why) _____	
C) Does each accepted substitution possess equivalent or better education, experience and qualifications than incumbent personnel? Yes <input type="checkbox"/> No <input type="checkbox"/> (If no, explain why) _____	
D) Was the substitute approved by the agency in writing? Yes <input type="checkbox"/> No <input type="checkbox"/> (If no, explain why) _____	
Section 4 – MBE Participation	

<p>A) What is the MBE goal as a percentage of the TO value? (If there is no MBE goal, skip to Section 5)</p> <p style="padding-left: 40px;">%</p>
<p>B) Are MBE reports D-5 and D-6 submitted monthly?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> (If no, explain why) _____</p>
<p>C) What is the actual MBE percentage to date? (divide the dollar amount paid to date to the MBE by the total amount paid to date on the TO)</p> <p style="padding-left: 40px;">%</p> <p>(Example - \$3,000 was paid to date to the MBE sub-contractor; \$10,000 was paid to date on the TO; the MBE percentage is 30% ($3,000 \div 10,000 = 0.30$))</p>
<p>D) Is this consistent with the planned MBE percentage at this stage of the project?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> (If no, explain why) _____</p>
<p>E) Has the Master Contractor expressed difficulty with meeting the MBE goal?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>(If yes, explain the circumstances and any planned corrective actions)</p> <p>_____</p>
<p>Section 5 – TO Change Management</p>
<p>A) Is there a written change management procedure applicable to this TO?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> (If no, explain why) _____</p>
<p>B) Does the change management procedure include the following?</p> <p style="padding-left: 40px;">Yes <input type="checkbox"/> No <input type="checkbox"/> Sections for change description, justification, and sign-off</p> <p style="padding-left: 40px;">Yes <input type="checkbox"/> No <input type="checkbox"/> Sections for impact on cost, scope, schedule, risk and quality (i.e., the impact of change on satisfying TO requirements)</p> <p style="padding-left: 40px;">Yes <input type="checkbox"/> No <input type="checkbox"/> A formal group charged with reviewing / approving / declining changes (e.g., change control board, steering committee, or management team)</p>
<p>C) Have any change orders been executed?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>(If yes, explain expected or actual impact on TO cost, scope, schedule, risk and quality)</p> <p>_____</p>
<p>D) Is the change management procedure being followed?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> (If no, explain why) _____</p>

ATTACHMENT 10 – LIVING WAGE AFFIDAVIT OF AGREEMENT

TORFP No. _____

Name of Contractor _____

Address _____

City _____ State _____ Zip Code _____

If the Contract is Exempt from the Living Wage Law

The Undersigned, being an authorized representative of the above named Contractor, hereby affirms that the Contract is exempt from Maryland's Living Wage Law for the following reasons: (check all that apply)

- Bidder/Offeror is a nonprofit organization
- Bidder/Offeror is a public service company
- Bidder/Offeror employs 10 or fewer employees and the proposed contract value is less than \$500,000
- Bidder/Offeror employs more than 10 employees and the proposed contract value is less than \$100,000

If the Contract is a Living Wage Contract

A. The Undersigned, being an authorized representative of the above named Contractor, hereby affirms our commitment to comply with Title 18, State Finance and Procurement Article, Annotated Code of Maryland and, if required, to submit all payroll reports to the Commissioner of Labor and Industry with regard to the above stated contract. The Bidder/Offeror agrees to pay covered employees who are subject to living wage at least the living wage rate in effect at the time service is provided for hours spent on State contract activities, and to ensure that its Subcontractors who are not exempt also pay the required living wage rate to their covered employees who are subject to the living wage for hours spent on a State contract for services. The Contractor agrees to comply with, and ensure its Subcontractors comply with, the rate requirements during the initial term of the contract and all subsequent renewal periods, including any increases in the wage rate established by the Commissioner of Labor and Industry, automatically upon the effective date of the revised wage rate.

B. _____ (initial here if applicable) The Bidder/Offeror affirms it has no covered employees for the following reasons: (check all that apply)

- All employee(s) proposed to work on the State contract will spend less than one-half of the employee's time during every work week on the State contract;
- All employee(s) proposed to work on the State contract will be 17 years of age or younger during the duration of the State contract; or
- All employee(s) proposed to work on the State contract will work less than 13 consecutive weeks on the State contract.

The Commissioner of Labor and Industry reserves the right to request payroll records and other data that the Commissioner deems sufficient to confirm these affirmations at any time.

Name of Authorized Representative: _____

Signature of Authorized Representative: _____

Date: _____ Title: _____

Witness Name (Typed or Printed): _____

Witness Signature & Date: _____

ATTACHMENT 11 – NOTICE TO PROCEED

Month Day, Year

TO Contractor Name

TO Contractor Mailing Address

Re: CATS+ Task Order Agreement # **R00B4400006**

Dear **TO Contractor Contact**:

This letter is your official Notice to Proceed as of **Month Day, Year**, for the above-referenced Task Order Agreement. Mr. / Ms. _____ of MSDE will serve as the TO Manager and your contact person on this Task Order. He / She can be reached at telephone _____.

Enclosed is an original, fully executed Task Order Agreement and purchase order.

Sincerely,

TO Procurement Officer

Task Order Procurement Officer

Enclosures (2)

cc: **TO Manager**

Procurement Liaison Office, Department of Information Technology

Project Management Office, Department of Information Technology

ATTACHMENT 12 – AGENCY RECEIPT OF DELIVERABLE FORM

I acknowledge receipt of the following:

TORFP Title: **Project Name for TORFP**

TO Agreement Number: # **R00B440006**

Title of Deliverable: _____

TORFP Reference Section # _____

Deliverable Reference ID # _____

Name of TO Manager: **TO Manager**

TO Manager Signature

Date Signed

Name of TO Contractor's Project Manager: _____

TO Contractor's Project Manager Signature

Date Signed

SUBMIT AS INSTRUCTED IN THE TORFP.

ATTACHMENT 13 – AGENCY ACCEPTANCE OF DELIVERABLE FORM

Agency Name: TO Requesting Agency
TORFP Title: TORFP Project Name
TO Manager: TO Manager and Phone Number

To:

The following deliverable, as required by TO Agreement # **R00B4400006**, has been received and reviewed in accordance with the TORFP.

Title of deliverable: _____

TORFP Contract Reference Number: Section # _____

Deliverable Reference ID # _____

This deliverable:

- Is accepted as delivered.**
- Is rejected for the reason(s) indicated below.**

REASON(S) FOR REJECTING DELIVERABLE:

OTHER COMMENTS:

TO Manager Signature

Date Signed

SUBMITTED AS REQUIRED IN THE TORFP.

ATTACHMENT 14- PERFORMANCE EVALUATION FORM (PEF)

(The TO Contractor shall submit one PEF for each employee as required)

Evaluation Month & Year:
Employee Name:
Role (TORFP Section 2.8):
Labor Category:

TO Contractor Name:
TO Contractor Contact:
MSDE TO Manager:

TO Requesting Agency: MSDE

TO Agreement Name: MARS Operation and Maintenance Support Agreement
TO Agreement #: R00B4400006

The information below shall be completed by the TO Manager or Designee and returned to the TO Contractor

PROJECT PERSONNEL PERFORMANCE RATING*

Performance Area	Satisfactory	Unsatisfactory
Work Productivity		
Work Quality		
Teamwork		
Communication		
Customer Service		

*Project Personnel should maintain a “Satisfactory” rating for each performance area. For any unsatisfactory ratings, the TO Manager may invoke the Mitigation Procedures for Unsatisfactory Performance as defined in Section 2.10.1 of TORFP. The TO Manager also may indicate “rejected” below and withhold payment pending employee performance mitigation or employee substitution.

Employee performance overall is accepted. Employee performance overall is rejected (for reasons indicated below).

REASON(S) FOR UNSATISFACTORY EMPLOYEE PERFORMANCE RATING/S:

OTHER COMMENTS:

TO Manager Signature

Date Signed

FORM REQUIRED PER SECTION 2.10

ATTACHMENT 15- WO TEMPLATE

WORK ORDER	Work Order #	Contract #		
This Work Order is issued under the provisions of a XXX contract. The services authorized are within the scope of services set forth in the <i>Purpose</i> of the work order.				
Purpose				
Statement of Work Requirements:				
<u>Deliverable(s), Acceptance Criteria and Due Date(s):</u>				
Deliverables are subject to review and approval by AGENCY prior to payment. <i>(Attach additional sheets if necessary)</i>				
Start Date	End Date			
Cost (Add additional lines if needed)				
Description for Resources / Task / Deliverables / Materials	Quantity (if applicable)	Labor Hours (Hrs.) (if applicable)	Labor Rate / Cost + Fee	Estimate Total
1.			\$	\$
2.			\$	\$
*Include WBS, schedule and response to requirements. *Include resume if requested.			AGENCY shall pay an amount not to exceed	\$
TO Contractor		AGENCY Approval		
<hr style="border: 0; border-top: 1px solid black; margin-bottom: 5px;"/> <i>(Signature)</i> TO Contractor Authorized Representative (Date)		<hr style="border: 0; border-top: 1px solid black; margin-bottom: 5px;"/> <i>(Signature)</i> AGENCY Engineer (Date)		
POC	<i>(Print Name)</i>	Engineer	<i>(Print Name)</i>	
Telephone No.		Telephone No.		
Email:		Email:		

ATTACHMENT 16 – 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:

- Providing goods or services of at least \$20 million in the energy sector of Iran; or
- 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: _____

–

Summary of Recommendations

1. Next Steps

- a. TORFP is approved for release assuming changes recommended by ITPO are accepted and issues described above are corrected. Please send released version to ITPO.

2. Content Comments

- b. ITPO inserted text to provide suggestions regarding content for this solicitation. Inserted text is often a placeholder for more complete content the Agency must supply. Review the insertions carefully.
- c. Do NOT accept all ITPO changes prior to careful review.
- d. Clean up remaining required sections for Technical Proposal in Section 3.
- e. Confirm changes in Selection Procedure in Section 4.3
- f. Confirm changes in solicitation and in Price Sheet as it related to the initial fixed price items. All items including the first three deliverables will be initiated using Work Orders. From evaluation perspective and to avoid double billing, this is included in all the labor rates for evaluation. The first WO will indicate actual cost per conversation with Tony Palcher. Agency will then approve or ask TO Contractor to change.
- g. Clean up all the Attachment 5 and match to information in Section 2.15 and 2.16.

3. Editorial Comments

- a. Update section cross-references and attachment references throughout document (Note: Incorrect cross references are the most frequent cause of Contract Amendments)
- b. Update all highlighted items with solicitation-specific content. ITPO inserted some on your behalf.
- c. Define each acronym the first time it is used, and then use the acronym thereafter.

4. Actions ITPO performed on your behalf (for which change tracking may not have been on)

- a. Replaced text in existing sections with currently approved boilerplate text
- b. Updated formatting and some grammar for readability.