

# Request for Resume (RFR) for Project Manager (Senior)

## CATS+ Master Contract

**All Master Contract Provisions Apply**

| Section 1 – General Information   |   |                                   |                           |
|---|---|-----------------------------------|---------------------------|
| <b>RFR Number:</b><br>(Reference BPO Number)  | R00B4400106   |                                   |                           |
| <b>Functional Area</b><br>(Enter One Only)  | Functional Area 10  |                                   |                           |
| Labor Category/s  |   |                                   |                           |
| <i>Enter the labor category/s to be provided:</i>   |   |                                   |                           |
| <b>Project Manager (Senior)</b>   |   |                                   |                           |
| <b>Anticipated Start Date</b>   | February 24, 2013   |                                   |                           |
| <b>Duration of Assignment</b>   | One Year with Two One-Year Renewal Option   |                                   |                           |
| <b>Designated Small Business Reserve?(SBR):</b><br>(Enter "Yes" or "No")  | YES   |                                   |                           |
| <b>MBE Goal, if applicable</b>  | 0%  |                                   |                           |
| <b>Issue Date:</b><br>mm/dd/yyyy  | February 4, 2014  | <b>Due Date:</b><br>mm/dd/yyyy    | February 19, 2014         |
|   |   | <b>Time (EST):</b><br>00:00 am/pm | No Later than 2:00 PM EST |
| <b>Place of Performance:</b>  | Maryland State Department of Education (MSDE)<br>200 West Baltimore Street<br>Baltimore, MD 21201         |                                   |                           |
| <b>Special Instructions:</b><br>(e.g. interview information, attachments, etc.)   | Interviews will be conducted by a panel of three persons using a standardized set of interview questions. |                                   |                           |
| <b>Security Requirements</b><br>(if applicable):  | Pass reference checks and obtain State ID Badge   |                                   |                           |
| Invoicing Instructions  |   |                                   |                           |
| <ol style="list-style-type: none"> <li>1. After the end of each month, the Master Contractor shall complete the top portion of the Performance Evaluation Form (PEF) (Attachment 4) and send it to the Agency Task Order (TO) Manager. Supporting timesheets and activity reports may also be required in conjunction with the PEF.</li> <li>2. The Agency TO Manager shall enter performance ratings and return the PEF to the Master Contractor.</li> <li>3. Upon receipt of a PEF containing an "Average / Overall Rating" of 3 or higher (out of 5), the Master Contractor shall send a copy of the PEF with an invoice to the Agency TO Manager.</li> <li>4. If the PEF contains an Average / Overall Rating below 3, invoicing by the Master Contractor is <u>not authorized</u> and shall not resume until performance issues are mitigated to the Agency TO Manager's satisfaction.</li> <li>5. The Master Contractor shall invoice as follows: <ul style="list-style-type: none"> <li>• Annual Labor Rate: Task Orders awarded at the Annual Labor Rate shall be invoiced monthly for 1/12 the Annual Labor Rate.</li> <li>• Hourly Labor Rate: Task Orders awarded at the Hourly Labor Rate shall be invoiced monthly for actual hours x Labor Rate.</li> </ul> </li> </ol> |   |                                   |                           |

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| <b>Special Invoicing Instructions:</b>   | Invoices along with the approved consultant work log and approved timesheet should be submitted to Accounts Payable at the address listed above |                                |              |
| <b>Section 2 – Agency Procurement Officer (PO) Information</b>   |   |                                |              |
| <b>Agency / Division Name:</b>   | Maryland State Department of Education  |                                |              |
| <b>Agency PO Name:</b>   | Dorothy Richburg  | <b>Agency PO Phone Number:</b> | 410-767-0628 |
| <b>Agency PO Email Address:</b>  | drichburg@msde.state.md.us  | <b>Agency PO Fax:</b>          | 410-333-2017 |
| <b>Agency PO Mailing Address:</b>  | Same as above   |                                |              |
| <b>Section 3 – Scope of Work</b>   |   |                                |              |
| <b>Agency / Project Background</b>   |   |                                |              |
| <p>MSDE exemplifies energetic leadership and innovative products and services to improve public education, library services, and rehabilitation services. The Agency has receives funds from the US Department of Education and other entities to implement educational reforms in Maryland and improve the collection and dissemination of information on school and student performance.</p> <p>On August 24, 2010, Maryland was awarded one of the federal government’s coveted Race to the Top (RTTT) grants in the amount of \$250 million over four years. The RTTT program is aimed at boosting student achievement, reducing gaps in achievement among student subgroups, turning around struggling schools, and improving the teaching profession.</p> <p>Maryland’s vision for reform is to:</p> <ul style="list-style-type: none"> <li>• Revise the PreK-12 Maryland State Curriculum, assessments, and accountability system based on the Common Core Standards to assure that all graduates are college- and career-ready.</li> <li>• Build a statewide technology infrastructure that links all data elements with analytic and instructional tools to monitor and promote student achievement.</li> <li>• Redesign the model for preparation, development, retention, and evaluation of teachers and principals.</li> <li>• Fully implement the innovative Breakthrough Center approach for transforming low-performing schools and districts.</li> </ul> <p>Race to the Top has a total of fifty-four different initiatives which includes technology and academic projects.</p> <p>As MSDE enters into the fourth year of the RTTT project, MSDE is seeking <b>up to two (2)</b> Senior Project Managers to supervise and administer the final stages of the implementation of the academic and technology aspects of its Race to the Top project.</p> <p>This is an extremely high profile project that requires a person of significant knowledge and skill in technology as well as a vision for delivering instructional solutions for classroom teachers. The selected person must also have excellent interpersonal skills in order to deal with a wide variety of personnel and audiences as well as solid project management skills that help them manage the technical and financial aspects of the project to closure, meeting all stated objectives with quality, on time and within budget.</p> |   |                                |              |

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| <b>Job Description/s</b>  |   |
|---|---|
| <b>Labor Category/s<br/>(From Section 1 Above)</b>  | <b>Duties / Responsibilities</b>  |
| 1. Senior Project Manager (SPM)   | <p>The Senior Project Manager (SPM) is responsible for the overall supervision and administration of all of the technology and academic projects associated with Maryland’s Race to the Top project. This will include ensuring that individual project managers and supervisors create in a timely way various project plans that will deliver the project objectives. The PM will supervise the activities of project teams, foresee, plan, organize and control the resources necessary to effectively meet the project deliverables, manage the entire project process and assure for the successful attainment of each and every goal set out at the onset of each project. The PM will also assist with the writing and revisions of all amendments and any other management duties of these projects as assigned.</p> <p>The position shall ensure the appropriate application of the Project Management Institute’s (PMI) Project Management Body of Knowledge (PMBOK) and the State’s Systems Development Lifecycle (SDLC) in managing the project.</p> <p>For a detailed description of required Project manager’s duties, responsibilities and deliverables, see Attachment.</p>   |
| <b>Minimum Qualifications</b>   |   |
| <p>For minimum qualifications, see the labor category description in the CATS+ RFP for the subject RFR labor category. In addition, qualified candidates <u>must</u> meet the minimum qualifications specified below. <b>Candidates that do not meet minimum qualifications will be deemed not reasonably susceptible for award and will not progress to full evaluation.</b></p> |   |
| <b>Labor Category/s<br/>(From Section 1 Above)</b>  | <b>Minimum Qualifications</b>   |
| 1. Senior Project Manager   | <p><b>Education:</b></p> <ul style="list-style-type: none"> <li>• Bachelor’s Degree from an accredited college or university in Business, Information Technology or other related discipline. Master’s Degree from an accredited college or university preferred.</li> </ul> <p><b>General Experience:</b></p> <ul style="list-style-type: none"> <li>• At least ten (10) years of successful experience in project management.</li> <li>• PMI certification as a PMP.</li> </ul> <p><b>Specialized Experience:</b></p> <ul style="list-style-type: none"> <li>• At least ten (10) years of experience in managing IT and/or academic related projects to closure within budget, on schedule, meeting all deliverables and outcomes with quality.</li> <li>• Must demonstrate a leadership role in at least three major (budget of over \$100 million ) successful projects that were delivered on time and on budget.</li> <li>• Must demonstrate at least ten (10) years experience in providing daily oversight, management and technical leadership for implementation of information technology projects.</li> <li>• Must demonstrate at least eight (8) years leadership in oversight of procurements and implementation of commercially available off the shelf (COTS) solutions</li> <li>• Must demonstrate at least eight (8) years of operational ability to ensure project management compliance in accordance with the State of Maryland SDLC and PMBOK.</li> </ul> |

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|  | <ul style="list-style-type: none"> <li>• Must demonstrate at least ten (10) years leadership in conducting financial management, resource management, project schedule management, risk management, organization change management and professional development for end-user adoption.</li> <li>• Must demonstrate at least ten (10) years of coordinating staff acquisition and resource planning to ensure projects are adequately staffed and delivered on time with quality based on identified goals and objectives of the projects</li> <li>• Must demonstrate at least ten (10) years of preparing and providing regular financial, resource and project schedule executive updates</li> <li>• Must demonstrate at least ten (10) years of providing forecasts of budget, resource and timeline accomplishments and challenges</li> <li>• Must demonstrate at least ten (10) years in identifying methods to address, and mitigate financial, resource and timeline issues potentially preventing accomplishment of goals and objectives.</li> </ul> |
|--|---|

#### Preferred Qualifications

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

|                           |  |
|---------------------------|--|
| 1. Senior Project Manager | <p><b>Education:</b></p> <ul style="list-style-type: none"> <li>• Master’s Degree preferred</li> </ul> <p><b>General Experience:</b></p> <ul style="list-style-type: none"> <li>• See Attached</li> </ul> <p><b>Specialized Experience:</b></p> <ul style="list-style-type: none"> <li>• See Attached</li> </ul> |
|---------------------------|--|

#### Section 4 - Required Submissions

**NOTE:**

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

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

- Resume for each labor category described in the RFR (Attachment 1)
- Three (3) current references that can be contacted for performance verification of the submitted consultant’s work experience and skills. Telephone number and email address of reference is needed.

**Email 2 of 2 with “Financial”: Master Contractor Name, RFR number, & candidate name in the subject line**

- Price Proposal (Attachment 2)
- Conflict of Interest Affidavit (Attachment G in the CATS+ RFP)
- Living Wage Affidavit (Attachment I in the CATS+ RFP)

|                                    |
|------------------------------------|
| 1. Copy of current PMI Certificate |
| 2.                                 |

#### Section 5 – Evaluation Criteria –

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

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- |   |
|---|
| 1. Relevant project management experience |
| 2. Training and education                 |
| 3. References                             |
| 4. Price                                  |

**Basis for Award Recommendation**

The Agency PO will recommend award to the Master Contractor whose proposal is determined to be the most advantageous to the State, considering price and the evaluation factors set forth in the RFR. The Agency PO will initiate and deliver a Task Order Agreement to the selected Master Contractor. **Master Contractors should be aware that if selected, State law regarding conflict of interest may prevent future participation in procurements related to the RFR Scope of Work, depending upon specific circumstances.**

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**ATTACHMENT 1  
RFR RESUME FORM  
RFR # R00B4400106**

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

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

Candidate Name:

Master Contractor:

**A. Education / Training**

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

**B. Relevant Work Experience**

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

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

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

<add lines as needed>

**C. Employment History**

List employment history, starting with the most recent employment first

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

**D. References**

List persons the State may contact as employment references

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

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|  |  |  |  |
|--|--|--|--|
| <i>&lt;add lines as needed&gt;</i>   |  |  |  |
| <b>LABOR CATEGORY PERSONNEL RESUME SUMMARY</b><br><b>(ATTACHMENT 1 CONTINUED)</b><br>*"Candidate Relevant Experience" section must be filled out. Do not enter "see resume" as a response.   |  |  |  |
| <b>Proposed Individual's Name/Company:</b>   |  | <b>How does the proposed individual meet each requirement?</b> |  |
| <b>LABOR CATEGORY TITLE – PROJECT MANAGER (SENIOR)</b>   |  |  |  |
| <b>Requirement</b>   |  | <b>Candidate Relevant Experience *</b>                         |  |
| <b>Education:</b> <ul style="list-style-type: none"> <li>Bachelor's Degree from an accredited college or university in Engineering, Computer Science, Information Systems, Business or other related discipline.</li> </ul>  |  | <b>Education:</b>  |  |
| <b>General Experience:</b> <ul style="list-style-type: none"> <li>At least ten (10) years of experience in project management</li> <li>PMI certification as a PMP.</li> </ul>  |  | <b>General Experience:</b>                                     |  |
| <b>Specialized Experience:</b> <ul style="list-style-type: none"> <li>At least ten (10) years of experience in managing IT and academic related projects</li> <li>Must demonstrate a leadership role in at least three successful projects that were delivered on time and on budget.</li> </ul>   |  | <b>Specialized Experience:</b>                                 |  |
| <i>Describe additional professional experience, knowledge, and skills required for this position.</i>  |  |  |  |
| <p>The information provided on this form for this labor category is true and correct to the best of my knowledge:</p> <p><b>Master Contractor Representative:</b></p> <p>_____</p> <p>Print Name <span style="margin-left: 150px;">Signature</span> <span style="margin-left: 100px;">Date</span></p> <p><b>Proposed Individual:</b></p> <p>_____</p> <p>Signature <span style="margin-left: 150px;">Date</span></p> |  |  |  |

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**ATTACHMENT 2  
PRICE PROPOSAL  
RFR # R00B4400106**

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

| <b>Period 1 (Month Day, Year – Month Day, Year)</b>        |                                 |                                |                        |                                   |
|--|---------------------------------|--------------------------------|------------------------|-----------------------------------|
| CATS+ Labor Category                                       | A                               | B                              | C                      | D                                 |
|  | Fully Loaded Annual Labor Rate* | Fully Loaded Hourly Labor Rate | Up to Evaluation Hours | PERIOD 1 Evaluation Price (B x C) |
| Project Manager (Senior)                                   | \$                              | \$                             | 2080                   | \$                                |
| Total Period 1 Evaluation Price:                           |                                 |                                |                        |                                   |
| <b>Option Period 1 (Month Day, Year – Month Day, Year)</b> |                                 |                                |                        |                                   |
| CATS+ Labor Category                                       | A                               | B                              | C                      | D                                 |
|  | Fully Loaded Annual Labor Rate* | Fully Loaded Hourly Labor Rate | Up to Evaluation Hours | PERIOD 2 Evaluation Price (B x C) |
| Project Manager (Senior)                                   | \$                              | \$                             | 2080                   | \$                                |
| Total Period 2 Evaluation Price:                           |                                 |                                |                        |                                   |
| <b>Option Period 2 (Month Day, Year – Month Day, Year)</b> |                                 |                                |                        |                                   |
| CATS+ Labor Category                                       | A                               | B                              | C                      | D                                 |
|  | Fully Loaded Annual Labor Rate* | Fully Loaded Hourly Labor Rate | Evaluation Hours       | PERIOD 3 Evaluation Price (B x C) |
| Project Manager (Senior)                                   | \$                              | \$                             | 2080                   | \$                                |
| Total Period 3 Evaluation Price:                           |                                 |                                |                        |                                   |
| <b>Total RFR Price (Sum of Period 1-3 Prices):</b>         |                                 |                                |                        | \$                                |

VENDOR'S NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY, STATE AND ZIP CODE \_\_\_\_\_

FIN \_\_\_\_\_ DUNS \_\_\_\_\_

TELEPHONE NO. \_\_\_\_\_ FAX NO. \_\_\_\_\_

EMAIL ADDRESS \_\_\_\_\_

SIGNATURE \_\_\_\_\_

PRINTED NAME \_\_\_\_\_

TITLE \_\_\_\_\_ DATE \_\_\_\_\_



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

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| <p><b>ATTACHMENT 3</b></p> <p><b>RFR #R00B4400106</b></p> <p><b>SENIOR PROJECT MANAGER (SPM)</b></p> <p><b>DUTIES &amp; RESPONSIBILITIES</b></p>   |  |
| <p><b>1. ROLE DEFINITIONS</b></p> <p>The purpose of this section is to distinguish among the roles interacting with the SPM obtained through this RFR.</p>   |  |
| A.   | <p>Task Order (TO) Procurement Officer – State staff person responsible for managing the RFR process up to the point of TO award.</p> <p>Dorothy Richburg</p>  |
| B.   | <p>TO Manager – State staff person who oversees the SPM’s work performance and administers the TO once it is awarded.</p> <p>Mary Gable/Penelope Thornton Talley, Esq.</p>   |
| C.   | <p>TO Contractor – The CATS+ Master Contractor awarded a TO as a result of this RFR. The TO Contractor shall provide the SPM resource and be accountable for SPM work performance under the TO.</p>  |
| D.   | <p>Senior Project Manager (SPM) – The person provided by the TO Contractor as a result of this RFR. The SPM is responsible for overall project planning, execution and management of quality deliverables and appropriate communication to RTTT leadership. The SPM is responsible for performing the duties and responsibilities described in Attachment 3, and for completing all assigned tasks and deliverables under the TO. The SPM reports directly to the TO Manager and shall oversee and direct the Project Team made up of State and contractual personnel.</p> |
| <p><b>2. SENIOR PROJECT MANAGER DUTIES AND RESPONSIBILITIES</b></p>  |  |
| <p>The SPM shall oversee and direct the project team comprised of current State and contractual personnel. Responsibilities include overall project governance and direction, and risk management as needed. Duties shall focus on project monitoring, control, team integration, change integration, and corrective action as needed. The position shall ensure the application of PMI and State SDLC standards in managing the project.</p> <p>The SPM shall report to the TO Manager and perform the tasks described in the table below. The SPM shall be capable of performing all assigned tasks with self-sufficiency and minimal guidance from the TO Manager. SPM performance shall be rated by the State each month, based on performance in the nine PMBOK knowledge areas as applied to the Project, and the quality of the written deliverables described in Section 7 below (See Exhibit 1 – Deliverable Product Acceptance Form for performance rating criteria).</p> <p>The SPM shall be accountable for the creation of any and all written deliverables that do not exist for the project, and for the updating of those that do exist. The SPM shall ensure that all deliverables are consistent with standards in the Project Management Institute (PMI) Project Management Body of Knowledge (PMBOK) and State of Maryland System Development Life Cycle (SDLC) (see Section 3 below).</p> |  |

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| <b>SPM Project Management Duties</b>   |  |
|--|--|
| An asterisk (*) by the section number below and bold italics identifies a deliverable associated with the duty / responsibility. Refer to Section 7 for full descriptions of all deliverables and time of performance. |  |
| 2.1  | Become thoroughly knowledgeable on all aspects of the Project.   |
| 2.2  | <p>Provide Project Management consistent with PMI and PMBOK principles of project management and the State of Maryland SDLC. Manage and integrate project resources including oversight of the project team. Exercise PM best practices for the Project and oversee project activities consistent with the nine knowledge areas including:</p> <ul style="list-style-type: none"> <li>• Procurement Management - consisting of procurement planning, contracts planning, authoring solicitations, evaluation, requesting solicitation responses, selecting contractor(s), administering contract(s), and contract(s) closing activities.</li> <li>• Schedule Management - consisting of activity definition and sequencing, resource estimating, duration estimating, schedule development, and schedule control activities.</li> <li>• Integration Management - consisting of project plan development, project plan execution, and integrated change control activities.</li> <li>• Scope Management - consisting of project initiation, scope planning, scope definition and scope change control activities.</li> <li>• Cost Management - consisting of resource planning, cost estimating, budgeting and cost control activities.</li> <li>• Human Resources Management - consisting of organizational planning, project team acquisition and staff development activities.</li> <li>• Risk Management - consisting of risk management planning, risk identification, risk quantitative and qualitative analysis, response planning, monitoring, and control activities.</li> <li>• Quality Management - consisting of quality planning, quality assurance and quality control activities.</li> <li>• Communications Management - consisting of communications planning, information distribution, progress and performance reporting, and stakeholder communications management activities.</li> </ul> |
| 2.3  | <p>Create (if necessary) and manage updating of the Project Management Plan</p> <ul style="list-style-type: none"> <li>• Ensure that plan components adequately document how the project will be executed, monitored and controlled.</li> <li>• Ensure that the plan adequately defines the managerial, technical, financial and supporting processes and activities necessary for sound project development.</li> <li>• Ensure that the plan adequately covers topics such as Scope Management, Schedule Management, Quality Management, Resource Management, Communications Management, Project Change Management, Risk Management, Procurement Management and others as deemed necessary to manage the project. Plan should be updated on a regular basis (every two weeks on average)</li> </ul>   |
| 2.4  | <p>Oversee integration of other Project Contractors' schedules and methodologies into the <i>Integrated Master Schedule</i> (see 2.5 above) to track all project progress.</p> <ul style="list-style-type: none"> <li>• Ensure appropriate updates to the Project Management Plan (see 2.3 above) and related project components as outlined in the SDLC.</li> </ul>   |

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|      | Develop, document and implement escalation and resolution processes for the project and communicate the process to all stakeholders.  |
| 2.5  | <p>Ensure the Project Team has created and is updating a Deliverable Comments Matrix (DCM)</p> <ul style="list-style-type: none"> <li>• Ensure that the Project Team reviews, and coordinates the review among appropriate stakeholders, of Project deliverables for completeness and conformance to requirements.</li> <li>• Ensure the Project Team documents resulting issues and questions in the DCM to be resolved by the Development Contractor prior to deliverable acceptance.</li> <li>• Ensure the Project Team reviews subsequent updated versions of deliverables to confirm all issues and questions have been resolved satisfactorily.</li> <li>• The DCM process is part of the Quality Assurance Plan.</li> </ul>  |
| 2.6  | <p>Create (if necessary) and manage updating of the Change Management Plan that describes the process for making changes to project scope, requirements, or cost as necessary.</p> <p>At a minimum, the Change Management Plan shall:</p> <ul style="list-style-type: none"> <li>• Describe the change management and approval processes to include: <ul style="list-style-type: none"> <li>– Coordination with the TO Procurement Officer to define change order scope, cost, and project impact of proposed changes to the project;</li> <li>– Coordination with the TO Manager for review and approval of proposed changes to the project;</li> <li>– Coordination with the Project Team and any Contractors for review and agreement on proposed changes;</li> <li>– Coordination with the TO Manager and any Contractors for documentation and implementation of change orders; and</li> <li>– Project integration management consistent with the PMBOK for approved changes.</li> </ul> </li> <li>• Describe the tools used (i.e. change request form)</li> </ul> |
| 2.7  | <p>Ensure creation and ongoing updating of the PM Status Report and Timesheet</p> <p>At a minimum, the PM Status Report and Timesheet shall:</p> <ul style="list-style-type: none"> <li>• Report on completed and planned project activities for the reporting period,</li> <li>• Highlight schedule deviation from baseline,</li> <li>• Provide schedule updates, progress of work being performed, milestones attained, resources expended,</li> <li>• Document risks, and issues encountered and corrective actions taken</li> <li>• Track project cost and expenditures</li> </ul>  |
| 2.8  | <p>Ensure that the Project Team will collect, organize, store, and manage project documents in a central repository. This includes:</p> <ul style="list-style-type: none"> <li>• Maintaining current and archival files (electronic and paper)</li> <li>• Collecting and distributing information to and from stakeholders</li> <li>• Entering updates into project tracking systems</li> </ul>   |
| 2.9  | Function as a liaison between Agency personnel, Executive Sponsors and any Contractors.   |
| 2.10 | Assign other minor duties related to project management support to the Project Team. Minor duties may include:  |

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|      | <ul style="list-style-type: none"> <li>• Responding to phone calls and email</li> <li>• Making photo copies</li> <li>• Scheduling and attending ad hoc meetings</li> <li>• Engaging in TO performance discussions</li> <li>• Coordinating Development Contractor invoicing</li> <li>• Participating in Independent Verification &amp; Validation (IV&amp;V) assessments.</li> </ul>  |
| 2.11 | <p>Ensure the creation/updating of a Human Resource Management Plan</p> <p>At a minimum, the Human Resource Management Plan shall:</p> <ul style="list-style-type: none"> <li>• Identify project tasks and assignments and work with Agency and any Contractors to resolve workload conflicts.</li> <li>• Define roles and responsibilities needed for each resource on the project.</li> <li>• Provide projections for resource and resource utilization.</li> <li>• Define staff acquisition strategy including backfilling of State resources if applicable.</li> <li>• Document staff training plan if required.</li> <li>• Define organizational structure based on resources.</li> </ul> |
| 2.12 | <p>Ensure the creation/updating of a Schedule Management Plan</p> <p>At a minimum, the Schedule Management Plan shall:</p> <ul style="list-style-type: none"> <li>• Document tools the project will use to manage the schedule and frequency of updates.</li> <li>• Define process for how schedule shall be tracked and reported including metrics used to report overall schedule performance.</li> <li>• Define process for schedule change process, including the process for baselining schedule and approving schedule changes.</li> </ul>   |
| 2.13 | Other project-related duties as assigned by TO Manager.  |

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| <b>3. REQUIRED PROJECT POLICIES, GUIDELINES AND METHODOLOGIES</b>  |  |
| <p>The SPM shall keep informed of and comply with all applicable laws, regulations, policies, standards and guidelines affecting information technology projects applicable to activities and obligations under the TO Agreement, as those laws, policies, standards and guidelines may be amended from time to time. The SPM shall adhere to and remain abreast of current, new, and revised laws, regulations, policies, standards and guidelines affecting project execution and it shall obtain and maintain, at its expense, all licenses, permits, insurance, and governmental approvals, if any, necessary to the performance of its obligations under the TO Agreement. These may include, but are not limited to:</p> |  |
| A.   | The nine project management knowledge areas in the PMI's PMBOK.  |
| B.   | The State's SDLC methodology at: <a href="http://www.doit.maryland.gov">www.doit.maryland.gov</a> - keyword: SDLC.   |
| C.   | The State's IT Security Policy and Standards at: <a href="http://www.DoIT.maryland.gov">www.DoIT.maryland.gov</a> - keyword: Security Policy.                                      |
| D.   | The State's IT Project Oversight at: <a href="http://www.DoIT.maryland.gov">www.DoIT.maryland.gov</a> - keyword: IT Project Oversight.   |
| E.   | The State of Maryland Enterprise Architecture at <a href="http://www.DoIT.maryland.gov">www.DoIT.maryland.gov</a> - keyword: MTAF (Maryland Technical Architecture Framework).     |
| <b>4. MONTHLY SPM PROJECT OVERSIGHT PERFORMANCE RATINGS</b>  |  |
| <p>Each month the TO Contractor shall submit a Performance Evaluation Form (PEF) to the TO Manager. The TO Manager will rate the SPM's performance based on the criteria described in the PEF.</p> <p>In the event of poor or non-performance by the SPM resulting in a rating of "unacceptable," payment shall be withheld pending the outcome of the procedures described in Section 5.</p>  |  |
| <b>5. MITIGATION PROCEDURES FOR POOR OR NON-PERFORMANCE</b>  |  |
| <p>As warranted by poor or non-performance by the SPM, the Agency shall pursue the following mitigation procedures prior to requesting a replacement SPM:</p>  |  |
| A.   | The TO Manager shall document performance issues and give written notice to the TO Contractor clearly describing problems and delineating remediation requirement(s).              |
| B.   | The TO Contractor shall respond with a written remediation plan within three business days and implement the plan immediately upon written acceptance by the TO Manager.           |
| C.   | Should performance issues persist, the TO Manager may give written notice or request the immediate removal of the SPM and determine whether a substitution is required.            |
| <b>6. WORK HOURS</b>   |  |
| A.   | The SPM will work an eight-hour day between the hours of 7:00 AM and 6:00 PM, Monday through Friday except for State holidays and Service Reduction days or other office closures. |

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## ATTACHMENT 4

### PERFORMANCE EVALUATION FORM (PEF) FOR SENIOR PROJECT MANAGER (SPM)

(Submitted monthly by the TO Contractor to initiate invoicing)

**TO Contractor:**

**Name of SPM Being Evaluated:**

**Date Submitted:**

**Performance Period (Month / Year):**

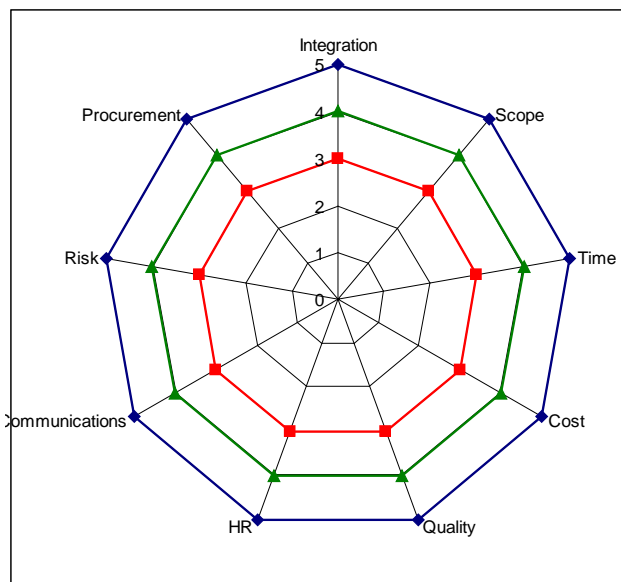
**Agency Name:**

**TO Manager / Agency Contact:**

**RFR / Reference BPO #**

***The Information Below Shall Be Filled-In by the Agency***

**PROJECT MANAGEMENT PERFORMANCE RATING DISPOSITION:**



| PM Processes               | Rating** |
|----------------------------|----------|
| Procurement Management     |          |
| Schedule Management        |          |
| Scope Management           |          |
| Cost Management            |          |
| Risk Management            |          |
| Human Resources Management |          |
| Quality Management         |          |
| Communications Management  |          |
| Integration Management     |          |
| Total Average Score        |          |

\*\*Rating is based on ***Project Management Performance Rating Criteria Sheet***. The Project Team should maintain score of 3 or higher for each process area and/or average score of 3. Scores below 3 may trigger the Mitigation Procedures defined in Section 5 above.

Performance is acceptable

Performance is unacceptable  
(for reasons indicated below).

**REASON(S) FOR UNACCEPTABLE PERFORMANCE RATING (List Deliverables or PM Process Areas):**

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TO Manager Signature

Date Signed

### Project Management Performance Rating Criteria

The TO Manager will evaluate and rate the FPM's management performance based on the overall Project Team's performance in each of the nine Knowledge Areas below. Applicable processes should score at 3 or higher.

#### Project Integration Management

| 0 | Not applicable for project.   | <u>Indicators of Process</u>  |
|---|---|---|
| 1 | Project Team has not established practices, standards, or processes for project. Work performed in ad hoc fashion and does not include integration management.                              | <ul style="list-style-type: none"> <li>• Project Charter</li> <li>• Project Management Plan (PMP)</li> <li>• Integrated Project Plan</li> <li>• Updated Project Schedule</li> </ul> |
| 2 | Project Team has established basic, documented processes for project planning and reporting exist. Management only involved on high-visibility projects.                                    |   |
| 3 | Project Team has institutionalized the Project integration efforts with documented procedures and standards. PM is beginning to integrate all project data.                                 |   |
| 4 | Project Team utilizes processes/standards for project on a regular basis and integrated with other processes/systems. Decisions on project based on performance metrics.                    |   |
| 5 | Project Team has established best practices including project integration improvement procedures utilized. Lessons learned are regularly examined and used to improve documented processes. |   |

#### Project Scope Management

| 0 | Not applicable for project.   | <u>Indicators of Process</u>   |
|---|---|--|
| 1 | Project has general statement of functional requirements. Little or no scope management or documentation for project. Management and stakeholders are aware of key milestones only.                 | <ul style="list-style-type: none"> <li>• Project Scope Statement</li> <li>• Change Request and Approval Process</li> <li>• Requirements Traceability Matrix (RTM)</li> <li>• Change Control Board</li> </ul> |
| 2 | Project Team has put basic scope management process in place. Scope management is meeting techniques irregularly.   |  |
| 3 | Project Team has implemented full project management process documented and is actively utilizing process on regular basis. Stakeholders are engaged and actively participating in scope decisions. |  |
| 4 | Project Team is utilizing full project management processes for the project. Projects managed and evaluated in light of other competing requirements.   |  |
| 5 | Project Team's effectiveness and efficiency metrics drive project scope decisions by appropriate levels of management.  |  |

#### Project Time/Schedule Management

| 0 | Not applicable for project.   | <u>Indicators of Process</u>  |
|---|---|---|
| 1 | Project Team has not established planning or scheduling standards. Lack of documentation makes it difficult to achieve repeatable project success.  | <ul style="list-style-type: none"> <li>• WBS</li> <li>• Schedule Management Plan</li> <li>• Activities duration based on historic data</li> </ul> |
| 2 | Project Team has established basic processes, but is not performing planning and scheduling on a regular basis.   |   |
| 3 | Project Team has established document time management processes and utilizes on a regular basis. Project-wide integration includes project dependencies.  |   |
| 4 | Project Team has established good practices in time management including utilization of historical data to forecast future performance. Project management decisions based on efficiency and effectiveness metrics. |   |



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|--|--|---|
| 5  | Project Team has additionally incorporated improvement procedures utilized for time management processes. Lessons learned are examined and used to improve documented processes.                                   |   |
| <b>Project Cost Management</b>           |  |   |
| 0  | Not applicable for project.  | <b><u>Indicators of Process</u></b>   |
| 1  | Project Team has not established practices or standards. Cost process documentation is ad hoc and individual project members follow informal practices.  | <ul style="list-style-type: none"> <li>• Cost Estimates Activity</li> <li>• Project Cost Baseline</li> <li>• Cost Management Plan</li> <li>• Cost Control</li> </ul>  |
| 2  | Project Team has established processes exist for cost estimating, reporting, and performance measurement. Cost management processes are used for the project.  |   |
| 3  | Project Team has standardized cost management practices for project team. Costs are fully integrated and reflect the true cost of the project.   |   |
| 4  | Project Team has integrated cost planning and tracking with Project Office, financial, and human resources systems. Standards tied to agency processes.  |   |
| 5  | Project Team leverages lessons learned to improve documented processes. Project Team and management are actively using efficiency and effectiveness metrics for decision making.                                   |   |
| <b>Project Quality Management</b>        |  |   |
| 0  | Not applicable for project.  | <b><u>Indicators of Process</u></b>   |
| 1  | Project Team has not established project quality practices or standards. Management is considering how they should define "quality".   | <ul style="list-style-type: none"> <li>• Quality Assurance Plan</li> <li>• Deliverables Acceptance Criteria defined</li> <li>• User Acceptance Criteria (UAC) per SDLC phases</li> <li>• Formal Deliverable Acceptance Process</li> </ul> |
| 2  | Project Team has established basic organizational project quality policy has been adopted. Project Management and Team encourage quality processes and policy for project.   |   |
| 3  | Project Team has established well documented quality management process and instituted standards for the project. Regular quality management activities are being executed including deliverables acceptance.      |   |
| 4  | Project Team has best practices for standard quality management processes. Management is actively involved in coordinating quality standards and assurance. Some metrics are developed.                            |   |
| 5  | Project Team has implemented guidelines for implementing improvements back into the process. Metrics are key to product quality decisions throughout the SDLC.   |   |
| <b>Project Human Resource Management</b> |  |   |
| 0  | Not applicable for project.  | <b><u>Indicators of Process</u></b>   |
| 1  | Project Team has not performed planning and staffing activities for project. Project teams are ad hoc. Human resource time and cost is not measured.   | <ul style="list-style-type: none"> <li>• Organization Chart</li> <li>• Roles and responsibilities matrix</li> <li>• Staffing Management Plan</li> <li>• Team Training Plan</li> <li>• Team performance assessment</li> </ul>              |
| 2  | Project Team has put processes in place that defines how to plan and manage human resources. Resource tracking is loosely performed for project.   |   |
| 3  | Project Team has established a regularly resource management process. Professional development program activities for team and organization have been established for successful implementation of project.        |   |
| 4  | Project Team has implemented resource management best practices including resource forecasts used for project planning and prioritization. Project team performance measured and integrated with team development. |   |
| 5  | Project Team includes HR processes which engage teams to document project lessons learned. Improvements are incorporated into human resources  |   |

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|   |   |  |
|---|---|--|
| management process.                     |   |  |
| <b>Project Communication Management</b> |   |  |
| <b>0</b>                                | Not applicable for project.   | <b><u>Indicators of Process</u></b>  |
| <b>1</b>                                | Project Team performing communications management on an ad hoc basis with informal status reports to management.  | <ul style="list-style-type: none"> <li>• Communication Management Plan</li> <li>• Project Performance Reports</li> <li>• Stakeholder Contact</li> <li>• Processes for communication of Risk, Issues and Decisions</li> </ul> |
| <b>2</b>                                | Project Team has established basic communications process including Communications Management Plan. Project progress reporting is occurring on a more regular basis.                                    |  |
| <b>3</b>                                | Project Team has active involvement by executing a formal project communications plan. All stakeholders and project team members are aware of communications process.                                   |  |
| <b>4</b>                                | Project Team has implemented best practices for communications management plan for the project.   |  |
| <b>5</b>                                | Project Team has put additional improvement process in place to continuously improve project communications management. Lessons learned are captured and incorporated.                                  |  |
| <b>Project Risk Management</b>          |   |  |
| <b>0</b>                                | Not applicable for project.   | <b><u>Indicators of Process</u></b>  |
| <b>1</b>                                | Project Team has not established any risk management practices or standards for project. Documentation is minimal and results are not shared. Risk response is reactive.                                | <ul style="list-style-type: none"> <li>• Risk Management Plan</li> <li>• Risk Register</li> <li>• Process for Risk Register updates and communication of risk</li> <li>• Contingency plans for risk</li> </ul>               |
| <b>2</b>                                | Project Team has established basic risk management processes and have documented for the project. Team members are involved with risks process and risks are shared for project.                        |  |
| <b>3</b>                                | Project Team has established regular risk management processes and risk activities, including identification and mitigation planning, are actively utilized for project.                                |  |
| <b>4</b>                                | Project Team has integrated risk processes with all aspect of project reporting including time, cost, and resource systems. Metrics are used to support risk decisions for the project.                 |  |
| <b>5</b>                                | Project Team has established best practices in risk management including continuous improvement processes to ensure project is continually measured and managed against performance metrics.            |  |
| <b>Project Procurement Management</b>   |   |  |
| <b>0</b>                                | Not applicable for project.   | <b><u>Indicators of Process</u></b>  |
| <b>1</b>                                | Project Team has not established procurement process for project. Processes are ad hoc at best with no clear plan defined.  | <ul style="list-style-type: none"> <li>• Procurement Management Plan</li> <li>• Contract Statement Of Work</li> <li>• Evaluation Criteria</li> <li>• Cost Benefit Analysis</li> <li>• Make/Buy Decisions</li> </ul>          |
| <b>2</b>                                | Project Team has established basic process for procurement of goods and services for project. Procurement Management Plan has been developed for procurement of all project goods and services.         |  |
| <b>3</b>                                | Project Team has established standards for procurement management on project and integrated with Agency processes.  |  |
| <b>4</b>                                | Project Team has leverage procurement management best practices such as make/buy decisions for the agency and project. Project procurement practices are integrated with project management mechanisms. |  |
| <b>5</b>                                | Project Team has instituted on-going process improvements focus on procurement efficiency and effective metrics.  |  |

**Request for Resume (RFR)  
CATS+ Master Contract**

**PROJECT MANAGER – RACE TO THE TOP  
RFR #R00B4400106**

**REQUIRED EDUCATION**

1. Bachelor's degree in IT-related field,
2. AND At least 5 (five) years of experience in project management
3. AND At least 5 (five) years of experience in information technology
4. Or relevant combination of education and experience.
5. PMP Certification desired.
6. Ability to manage multiple projects in a fast-paced, dynamic work environment and provide effective and decision making reporting to executives.
7. Strong decision making and problem solving skills and experience with successful project delivery.

**DESIRED CHARACTERISTICS AND ABILITIES**

1. In-depth knowledge of the Race to the Top grant program
2. Master's Degree Preferred
3. Understanding of the Maryland State Department of Education culture and systems
4. Vision for online instructional technology to improve classroom instruction
5. Outstanding interpersonal skills in order to deal with a wide variety of personnel and stakeholders
6. Project management experience on medium to large sized custom development software projects
7. Preferred: Experience with projects utilizing object-orient languages in a multi-tiered environment
8. Preferred: Experience with projects in education sector at district and/or state agency level.
9. Experience in managing distributed application development using Java / J2EE (WebSphere application server deployments preferred), open source frameworks, and enterprise reporting systems.
10. Strong understanding of the complete systems development lifecycle from project inception through operations and maintenance,
11. Experience with projects that combine COTS implementations with custom software development.
12. An understanding of system design using UML.
13. An understanding of data modeling
14. Project management and leadership skills in leading technical personnel through the delivery of complex projects.
15. Ability to facilitate and drive resolution of complex business and technical problems associated with software development project efforts.
16. Excellent business analysis skills
17. Good technical background
18. Excellent English communications skills.
19. Excellent ability to understand and express complex topics.

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20. Demonstrated leadership and attention to detail skills through prior experience at the strategic and tactical / implementation levels.
21. Strong leadership skills, to include resource allocation and planning skills, with software development projects.
22. Demonstrated ability to quickly comprehend project scope and business requirements.

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**RFR # R00B4400106  
DUTIES AND RESPONSIBILITIES**

1. Provide leadership for all aspects of the technology projects in Maryland's Race to the Top grant.
2. Supervise individual project managers effectively so that projects and deliverables get completed in a timely and high quality manner.
3. Directly oversee management and planning of all efforts associated with the projects to include: development and management of work plans, define and deliver individual project deliverables as a part of the overall program deliverables, manage the expectations of all stakeholders, organizing and addressing emerging project requirements, manage project relationships, manage one or more project teams in delivering the projects, and communicate and manage tasks and activities to a schedule with the team.
4. Actively manages and oversees the project management team's efforts, to include: project plan, scope management, budget management, resource management, time management (activities & task planning), communications, risk, procurement, QA and testing, user training, program / project delivery, transition planning and ongoing maintenance and support management. Provide regular and accurate reporting of comprehensive project status to RTTT leadership.
5. Provide guidance to MSDE management on technical options associated with the transformation of internal applications, contractor and state staff performance, and guidance on the feasibility of technical approaches to software development and commercial off the shelf (COTS) products.
6. Develop and manage a set scope of work within the project to be delivered through effective expectations setting, communications, change management control, budget control and management, manage a Requirements Traceability Document and overall business understanding of the project needs.
7. Manage development vendor assignments, contract issues and assigned tasks, conduct quality assurance reviews of vendor output, and develop acceptance criteria for vendor supported tasks.
8. Assist with contractor selection tasks
9. Report project progress, issues, risks, etc to Executive Sponsor/CIO, RTTT LEA or State Lead as appropriate. Proactively escalates issues with potential solutions to RTTT Leadership as needed.
10. Lend support to various business and technology teams as necessary during project implementation to ensure solid, scalable, robust solutions.
11. Communicate effectively in both verbal (i.e. day-to-day discussions, team meetings) and written (status reports, change requests) form, as well as have an overall ability to be clear and concise in all communications.
12. Accurately assess the risks associated with each project and systematically manage and report on project risks.
13. Conduct reviews of contract deliverables, perform design and code reviews.
14. Ensure that the solutions chosen by MSDE meet all the non functional requirements such as security, performance, maintainability, scalability, and extensibility.
15. Support reuse of software components and COTS products.
16. Ensure that solutions conform to industry best practices and Maryland state standards.

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17. Ensure that sound development practices are taking place in requirements management, systems testing, and configuration management. Replace old processes with newer ones where feasible.
18. Develop test plans, assist business users with functional test case development and manage acceptance test execution.
19. Effectively manage multiple priorities.
20. Perform all additional job-related duties as requested.

## **Request for Resume (RFR) CATS+ Master Contract**

### **DELIVERABLES**

1. Develops and then maintains overall Work Breakdown Structure (WBS) on MSDE technology activities using Microsoft Project 2007 on a weekly basis;
2. All meetings between MSDE staff and the TO Contractor require a Meeting Minutes to be completed and filed in the project workspace;
3. Delivers an accurate and regular comprehensive snapshot for each project that will cover current status including any interim actuals that need to be captured prior to monthly close of the state financial system.
4. Prepares a monthly status report for MSDE of the project 5 business days after the end of each month. The status report must cover the milestones due that month and any overdue milestones, status of all tasks, new risks identified, scope changes and any other project issues. Issues must include identification, escalation and resolution steps.
5. Prepares for the TO Manager a quarterly status report 5 business days after the end of each calendar quarter. Report shall be in a format as required by DOIT.
6. Develops a Requirements Traceability Document and maintain the document across all project phases;
7. Manages Change Control, Issues escalation and resolution, Schedule, Costs, and Resources as defined in the project management plan;
8. Review of deliverables by the major project development contractor for completeness, adherence to standards and contract requirements;
9. Works closely with functional managers to resolve team members' workload conflicts;
10. Ensures appropriate product-related training and documentation are developed and made available to customers through project team meetings; and
11. Develops and utilize a communications plan for project
12. Validates functional requirements and provides support for the RFP process
13. Prepares a System Boundary Analysis document that meets the State SDLC methodology under the System Concept Development Phase.
14. Prepares a Risk Management Plan document that meets the State SDLC methodology under the System Concept Development Phase.
14. Prepares a Project Management Plan document that meets the State SDLC methodology under the Planning Phase. It must document project scope, tasks, schedules resources and any interrelationships with other projects. The plan must detail the functional units involved, required job tasks, cost and schedule performance measurement, milestone and review scheduling. It must include a work breakdown structure for the project using Microsoft Project 2007. The plan must have a change management section to define the process to address project scope changes. It must be revised at the end of each phase of the SDLC.