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

Network and Server Infrastructure Upgrades

CATS TORFP PROJECT NUMBER ADPICS PO number

Maryland Insurance Administration

ISSUE DATE: March 24, 2006
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This Consulting and Technical Services (CATS) Task Order Request for Proposals (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. Those Master Contractors deciding not to submit a TO Proposal are required to submit the reason(s) why per Section 3.1 of the TORFP. 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 Budget and Management (DBM), Office of Information Technology (OIT) and subsequent Master Contract Project Number 050R5800338, including any amendments.

<table>
<thead>
<tr>
<th><strong>TORFP NAME:</strong></th>
<th>Network and Server Infrastructure Upgrade</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FUNCTIONAL AREA:</strong></td>
<td>Functional Area 1 – Enterprise Service Provider (ESP).</td>
</tr>
<tr>
<td><strong>TORFP ISSUE DATE:</strong></td>
<td>Wednesday, March 23, 2006</td>
</tr>
<tr>
<td><strong>Closing Date and Time:</strong></td>
<td>Friday, April 14, 2006 2 PM</td>
</tr>
<tr>
<td><strong>TORFP Issuing Office:</strong></td>
<td>Maryland Insurance Administration 525 St. Paul Place Baltimore, MD. 21202</td>
</tr>
<tr>
<td><strong>Questions and Proposals are to be sent to:</strong></td>
<td>TO Procurement Officer: Luci Sager Email Address: <a href="mailto:lsager@mdinsurance.state.md.us">lsager@mdinsurance.state.md.us</a></td>
</tr>
<tr>
<td><strong>TO Procurement Officer:</strong></td>
<td>Luci Sager Office Phone Number: 410-468-2374 Office Fax Number: 410-468-2396 <a href="mailto:lsager@mdinsurance.state.md.us">lsager@mdinsurance.state.md.us</a></td>
</tr>
<tr>
<td><strong>TO Manager:</strong></td>
<td>Paul Rudman Office Phone Number: (410) 468-2062 Office Fax Number: (410) 468-2289 <a href="mailto:prudman@mdinsurance.state.md.us">prudman@mdinsurance.state.md.us</a></td>
</tr>
<tr>
<td><strong>Project Number:</strong></td>
<td>ADPICS PO</td>
</tr>
<tr>
<td><strong>TO Type:</strong></td>
<td>Time and Materials</td>
</tr>
<tr>
<td><strong>Period of Performance:</strong></td>
<td>18 Weeks</td>
</tr>
<tr>
<td><strong>MBE Goal:</strong></td>
<td>Percentage 0%</td>
</tr>
<tr>
<td><strong>Primary Place of Performance:</strong></td>
<td>Maryland Insurance Administration 525 St. Paul Place Baltimore, MD. 21202</td>
</tr>
<tr>
<td><strong>TO Pre-Proposal Conference:</strong></td>
<td>Monday, April 3 1 to 3 PM</td>
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</table>
NOTICE TO MASTER CONTRACTORS

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. Those Master Contractors deciding not to submit a TO Proposal are required to submit the reason(s) why per Section 3.1 of the TORFP. If you have chosen not to propose to this TORFP, you must complete and email this notice to lsager@mdinsurance.state.md.us. If you are submitting a TO Proposal, we also ask that you take a few minutes and provide comments and suggestions regarding the enclosed TORFP.

TORFP Title:  Network and Server Infrastructure Upgrade
TORFP No.:  ADPICS PO

1. If you have responded with a "not submitting Task Order Proposal", please indicate the reason(s) below:

   ( ) Other commitments preclude our participation at this time.
   ( ) The subject of the TORFP is not something we ordinarily provide.
   ( ) We are inexperienced in the services required.
   ( ) Specifications are unclear, too restrictive, etc.  (Explain in REMARKS section.)
   ( ) The scope of work is beyond our present capacity.
   ( ) Doing business with the State of Maryland is too complicated. (Explain in REMARKS section.)
   ( ) We cannot be competitive. (Explain in REMARKS section.)
   ( ) Time allotted for completion of a Task Order Proposal is insufficient.
   ( ) Start-up time is insufficient.
   ( ) Bonding/Insurance requirements are too restrictive. (Explain in REMARKS section.)
   ( ) TORFP requirements (other than specifications) are unreasonable or too risky. (Explain in REMARKS section.)
   ( ) MBE requirements. (Explain in REMARKS section.)
   ( ) Prior State of Maryland contract experience was unprofitable or otherwise unsatisfactory. (Explain in REMARKS section.)
   ( ) Payment schedule too slow.
   Other:___________________________________________________________________________.

2. If you have submitted a Task Order Proposal, but wish to offer suggestions or express concerns, please use the Remarks section below.

Remarks: _____________________________________________________________________________________
_____________________________________________________________________________________
_____________________________________________________________________________________

Master Contractor
Name:_________________________________________Date:_________________________________________

Contact Person:_________________________ Phone ___- ___ - ____email____________________________
SECTION 1 - ADMINISTRATIVE INFORMATION

1.1 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. See Section 2.8 for information on change orders.

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.

1.2 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.

1.3 TO PROPOSAL SUBMISSIONS

The TO Procurement Officer will not accept submissions after the stated date and exact time. The time will be local time as determined by MIA’s e-mail system time stamp. The TO Proposal is to be submitted via e-mail as two attachments in MS Word format. The “subject” line in the e-mail submission shall state the TORFP #ADPICS PO. The first file will be the TO Proposal technical response to this TORFP and titled, “CATS TORFP #ADPICS PO Technical”. The second file will be the financial response to this CATS TORFP and titled, “CATS TORFP #ADPICS PO Financial”. Attachment 4 - Conflict of Interest and Disclosure Affidavit, must be submitted as .PDF files with signatures clearly visible.

1.4 MINORITY BUSINESS ENTERPRISE (MBE)

No MBE requirement for this TORFP.

1.5 eMARYLANDMARKETPLACE FEE

COMAR 21.02.03.06 requires that each Master Contractor that wins a TO Agreement under this TORFP pay a fee to support the operation of eMarylandMarketplace. The fee will be due on each TO Agreement that exceeds $25,000. The applicable fee will be based on TO value, including any options. Contractors shall pay the fee as provided by COMAR 21.02.03.06 and in accordance with guidelines issued by the Maryland Department of General Services. A copy of COMAR 21.02.03.06 and the guidelines issued by the Maryland Department of General Services can be found on the eMarylandMarketplace website at www.eMarylandMarketplace.com.

The rate(s) or price(s) of the proposal/bid shall include the appropriate fee as per the COMAR 21.02.06.03 fee schedule. Fees may not be quoted as a separate add-on price. A total TO Agreement value that is other than an even dollar amount will be rounded to the nearest whole dollar to determine the appropriate fee level. For example, a total TO Agreement value of $50,000.49 will be rounded to $50,000 and a Level 1 fee will apply. A total TO Agreement value of $50,000.50 will be rounded to $50,001 and a Level 2 fee will apply.
1.6 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 in the form included as Attachment 4 with 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 should be aware that the State Ethics Law, State Government Article, §15-508, might limit the selected Master Contractor’s ability to participate in future related procurements, depending on specific circumstances.

1.7 NON-DISCLOSURE AGREEMENT

Certain system documentation may be available for potential Offerors to review at a reading room at the Maryland Insurance Administration, 525 St. Paul Place, Baltimore, Maryland 21202. Offerors who review such documentation will be required to sign a Non-Disclosure Agreement in the form of Attachment 10. 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 in the form of Attachment 3.

1.8 LIMITATION OF LIABILITY CEILING

Pursuant to Section 28(C) of the CATS Master Contract, the limitation of liability per claim under this TORFP shall not exceed the total TO Agreement amount established.
SECTION 2 – SCOPE OF WORK

2.1 PURPOSE, BACKGROUND, AND OBJECTIVES

2.1.1 PURPOSE

The MIA is issuing this CATS TORFP to obtain a series of network and server infrastructure upgrades to help improve the performance and manageability of MIA’S WAN and to replace outdated network operating systems.

2.1.2 TO REQUESTING AGENCY INFORMATION

The MIA implements law, and develop policies, procedures and regulations that affect Maryland’s insurance industry. Our vision is a state with competitive, stable, and viable insurance markets in which insurance consumers are treated fairly.

The MIA’S priorities are to provide consumers protection from fraudulent activities, the knowledge needed for informed decisions, and information on the insurance options available in the State of Maryland. In addition, it is the goal of the Administration to provide these services more efficiently and at a lower cost.

2.2 PROJECT BACKGROUND

The services to be provided in general consist of an upgrade to replace MIA’S legacy network operating system that has reached its end of life and is no longer supported by the vendor. This includes servers that are currently running Windows NT 4.0. TO contractor support is required to complete this project in part due to the loss of in-house expertise. Because there is a requirement that some tasks must be completed prior to the migration to the new network OS, two phases are planned.

2.3 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:

PHASE 1 TASKS

2.3.1 Install and configure Open Enterprise Server, SUSE Enterprise Server on new two servers

2.3.1.1 Install and configure Open Enterprise Server, SUSE Linux Clustering Services on two OES Linux servers

2.3.1.2 Implement a server backup strategy for OES Linux servers

2.3.1.3 Reconfigure Network DNS and DHCP Services

2.3.1.4 Configure Open Enterprise Server Network Services

2.3.1.5 Migrate Network Printing

2.3.1.6 Configure and Install Windows 2003 Server on 2 Servers
2.3.8 Install and Configure Host Bus Adapters (HBA’S) and related EMC Software on 6 existing servers to be connected to the EMC CX500 SAN

PHASE 2 TASKS

2.3.9 Migrate Windows NT 4.0 Domain to eDirectory
2.3.10 Upgrade GroupWise 6.5 to GroupWise 7.0
2.3.11 Upgrade ZenWorks 6.5 to ZenWorks 7.0
2.3.12 Virtual Office Pilot Installation
2.3.13 Fraud Migration
2.3.14 Implement VMWARE

2.2.4 DELIVERABLES:

Phase 1

2.3.1 Requirements and Project Schedule Review  NTP + 2 Calendar Days
2.3.2 Install and Configure Open Enterprise Server NTP + 7 Calendar Days
2.3.3 Implement OES Server Backup NTP + 14 Calendar Days
2.3.4 Reconfigure Network DNS and DHCP Services NTP + 21 Calendar Days
2.3.5 Configure OES Network Services NTP + 28 Calendar Days
2.3.6 Migrate Network Printing NTP + 35 Calendar Days
2.3.7 Install and Configure 2 Windows 2003 Servers NTP + 42 Calendar Days
2.3.8 Install and Configure HBA’s on 6 Servers NTP + 49 Calendar Days

Phase 2

2.3.9 Migrate Windows NT 4.0 Domain to eDirectory NTP + 63 Calendar Days
2.3.10 Upgrade GroupWise 6.5 to GroupWise 7.0 NTP + 77 Calendar Days
2.3.11 Upgrade ZenWorks 6.5 to ZenWorks 7.0 NTP + 91 Calendar Days
2.3.12 Virtual Office Pilot Installation NTP + 98 Calendar Days
2.3.13 Fraud Migration NTP + 105 Calendar Days
2.3.14 Implement VMWARE NTP + 119 Calendar Days
Upon completion of a deliverable, the TO Contractor shall document each deliverable in final form to the TO Manager for acceptance. The TO Contractor shall memorialize such delivery in an Agency Receipt of Deliverable Form (Attachment 8). The TO Manager shall countersign the Agency Receipt of Deliverable Form indicating receipt of the contents described therein.

Upon receipt of a final deliverable, the TO Manager shall commence a review of the deliverable as required to validate the completeness and quality in meeting requirements. Upon completion of validation, the TO Manager shall issue to the TO Contractor notice of acceptance or rejection of the deliverables in an Agency Acceptance of Deliverable Form (Attachment 9). In the event of rejection, the TO Contractor shall correct the identified deficiencies or non-conformities. Subsequent project tasks may not continue until deficiencies with a deliverable are rectified and accepted by the TO Manager or the TO Manager has specifically issued, in writing, a waiver for conditional continuance of project tasks. Once the State’s issues have been addressed and resolutions are accepted by the TO Manager, the TO Contractor will incorporate the resolutions into the deliverable and resubmit the deliverable for acceptance. Accepted deliverables shall be invoiced within 30 days in the applicable invoice format (Reference 2.6 Invoicing).

When presented for acceptance, a written deliverable defined as a final document must satisfy the scope and requirements of this TORFP for that deliverable. Final written deliverables shall not contain structural errors such as poor grammar, misspellings or incorrect punctuation, and must:

A) Be presented in a format appropriate for the subject matter and depth of discussion.
B) Be organized in a manner that presents a logical flow of the deliverable’s content.
C) Represent factual information reasonably expected to have been known at the time of submittal.
D) Present information that is relevant to the section of the deliverable being discussed.

2.4.1 REQUIRED PROJECT 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. These may include, but are not limited to:

E) The TO Contractor shall follow the project management methodologies that are consistent with the Project Management Institute’s Project Management Body of Knowledge Guide. TO Contractor’s staff and subcontractors are to follow a consistent methodology for all TO activities,
2.5 TO CONTRACTOR PERSONNEL MINIMUM QUALIFICATIONS

The following minimum qualifications are mandatory:

2.45.1 Familiarity with MIA present infrastructure consisting of NT 4.0, GroupWise V. 6.5, Linux Suse V 2.6.5-7.244 - smp, ZenWorks V. 6.5, Linux Suse V 2.4.20 - 6 smp, EMC SAN, Extreme Networks, High Speed Switches

2.5.2 Proposed Personnel Must have expertise in

- Groupwise 6.5 and 7.0 Certified and Trained
- Zenworks 6.5 and 7.0 Certified and Trained
- Microsoft Windows NT, Server 2000 and Server 2003
- Certified and Trained on EMC Hardware and Software
- Certified and Trained on VMWARE
- Network DNS and DHCP Services
- Open Enterprise Server Network Services
- Novell Open Enterprise Server, SUSE Linux Enterprise Server 9
- eDirectory Certified and Trained
- File and Print Services (I-Print)

2.5.3 In addition to certification, a minimum of five (5) years experience in work with the products outlined in 2.5.2.

2.6 INVOICING

Payment will only be made upon completion and acceptance of the deliverables as defined in 2.2.3. Invoice payments to the TO Contractor shall be governed by the terms and conditions defined in the CATS Master Contract. Invoices for payment shall contain the TO Contractor's Federal Employer Identification Number (FEIN), as well as the information described below, and must be submitted to the TO Manager for payment approval. Payment of invoices will be withheld if a signed Acceptance of Deliverable form – Attachment 9, is not submitted.

The TO Contractor shall submit invoices for payment upon acceptance of separately priced deliverables, on or before the 15th day of the month following receipt of the approved notice(s) of acceptance from the TO Manager. A copy of the notice(s) of acceptance shall accompany all invoices submitted for payment.

2.6.1 INVOICE SUBMISSION PROCEDURE

This procedure consists of the following requirements and steps:

A) The invoice shall identify the Maryland Insurance Administration as the TO Requesting Agency, deliverable description, 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 of each invoice and supporting documentation (itemized billing reference for employees and any subcontractor and signed Acceptance of Deliverable form – Attachment 9, for each deliverable being invoiced) submitted for payment to the Maryland Insurance Administration at the following address:

Maryland Insurance Administration
525 St. Paul Place
Baltimore, Maryland 21202
ATTN: Ronda Green
C) Invoices for final payment shall be clearly marked as “FINAL” and submitted when all work requirements have been completed and no further charges are to be incurred under the TO Agreement. In no event shall any invoice be submitted later than 60 calendar days from the TO Agreement termination date.

2.7 REPORTING

2.7.1 Project Management:

The TO Contractor and the TO Requesting Agency shall conduct weekly progress meetings. A monthly project progress report shall be submitted 30 days in advance prior to the discussion to the TO Manager and shall contain, at a minimum, the following information:

- TO Requesting Agency name, TO Number, functional area name and number, reporting period and “Progress Report” to be included in the e-mail subject line.
- Work accomplished during the 30 day period.
- Deliverable progress, as a percentage of completion.
- Problem areas including scope creep or deviation from the work plan.
- Planned activities for the next reporting period.
- Gantt chart updated from the original to show actual progress; as applicable, explanations for variances and plan for completion on schedule.
- An accounting report for the current reporting period and a cumulative summary of the totals for both the current and previous reporting periods. The accounting report shall include amounts invoiced-to-date and paid-to-date.

2.8 CHANGE ORDERS

If the TO Contractor is required to perform additional work, or there is a work reduction due to unforeseen scope changes, 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 modifications shall be performed until a change order is executed by the TO Procurement Officer.
SECTION 3 - TO PROPOSAL FORMAT 
AND SUBMISSION REQUIREMENTS

3.1 REQUIRED RESPONSE

Each Master Contractor receiving this CATS TORFP must 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 Notice to Master Contractors explaining why the Master Contractor will not be submitting a proposal.

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. A TO Proposal shall provide the following:

3.2.1 THE TECHNICAL PORTION OF THE TO PROPOSAL SHALL INCLUDE:

A) Proposed Services – Work Plan

1) Requirements: A detailed discussion of the Master Contractor’s understanding of the work and the Master Contractor’s capabilities, approach and solution to address the requirements outlined in Section 2.
2) Assumptions: A description of any assumptions formed by the Master Contractor in developing the Technical Proposal.
3) Risk Assessment: An assessment of any risks inherent in the work requirements and actions to mitigate these risks.
4) Proposed Solution: A description of the Master Contractor’s proposed solution to accomplish the specified work requirements.
5) Proposed Tools: A description of all proposed tools that will be used to facilitate the work.
6) Tasks and Deliverables: A description of and the schedule for each task and deliverable, illustrated by a Gantt chart. Start and completion dates for each task, milestone, and deliverable shall be indicated. The Gantt chart will form the baseline for task order monitoring, and will be updated bi-weekly as part of progress reporting (see Section 2.7.1 Project Management).
7) Work Breakdown Structure: A detailed work breakdown structure and staffing schedule, with labor hours by skill category that will be applied to meet each milestone and deliverable, and to accomplish all specified work requirements.
8) Acceptance Criteria: A statement acknowledging the Master Contractor’s understanding of the acceptance criteria.

B) Proposed Personnel

1) Identify and provide resumes for all proposed personnel by labor category.
2) Provide the names and titles of all key management personnel who will be involved with supervising the services rendered under this TO Agreement.
3) Complete and provide Attachment 5 – Labor Classification Personnel Resume Summary.
C) Subcontractors

1) Identify all proposed subcontractors and their full roles in the performance of this TORFP Scope of Work.

D) Master Contractor and Subcontractor Experience and Capabilities

1) Provide three examples of projects that you have completed that were similar in scope to the one defined in this TORFP Scope of Work. Each of the three examples 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 Master Contractor is still providing these services and, if not, an explanation of why it is no longer providing the services to the client organization.

E) Proposed Facility

Maryland Insurance Administration, 525 St. Paul Place, Baltimore, Maryland 21202.

F) State Assistance

The MIA Network Support staff will assist in the following tasks for the estimated number of days listed for the task:

- Requirements and Project Schedule Review – 1 Day
- Implement OES Server Backup – 1 Day
- Migrate Network Printing – 3 Days
- Install and Configure 2 Windows 2003 Servers – 1 Day
- Install and Configure HBA’s and related EMC Software on 6 Servers – 2 Days
- Migrate Windows NT 4.0 Domain to eDirectory – 3 Days
- Upgrade GroupWise 6.5 to GroupWise 7.0 – 3 Days
- Upgrade ZenWorks 6.5 to ZenWorks 7.0 – 3 Days
- Implement VMWARE – 3 Days

G) Confidentiality

1) 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.

B) Completed Financial Proposal - Attachment 1 including:

The Offeror shall provide the following in the Financial Proposal:

a) A cumulative sum for each category (e.g. labor hours and material) of prices and the total contact costs shall be indicated
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, the TO Requesting Agency 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.

- Proposed personnel will be assessed for compliance with the minimum qualifications in Section 2.5 of the TORFP. Master Contractor's proposing personnel who fail to meet the minimum qualifications will be disqualified and their proposals eliminated from further consideration.
- The efficiency and effectiveness of the work plan, including the approach and methodology for completing the requirements of this task order, the reporting mechanism for ensuring project schedules are met, and change control and testing methodology.
- Satisfactory past performance on engagements provided as references in the offereor’s Technical Proposal to the TORFP or other engagements not provided in the Technical Proposal but known to the State, especially previous task orders prepared under the Master Contract.

4.3 SELECTION PROCEDURES

4.3.1 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.

4.3.2 Qualified TO Proposal financial responses will be reviewed and ranked from lowest to highest price proposed.

4.3.3 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, Purchase Order and by a Notice to Proceed authorized by the TO Procurement Officer.
ATTACHMENT 1
PRICE PROPOSAL

PRICE PROPOSAL FOR CATS TORFP # ADPICS PO number
LABOR CATEGORIES

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Labor Categories</th>
<th>A</th>
<th>B</th>
<th>C</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td>Hourly Labor Rate</td>
<td>Total Class Hours</td>
<td>Total Proposed CATS TORFP Price</td>
</tr>
<tr>
<td>(Insert Proposed Labor Categories for this TORFP)</td>
<td>$</td>
<td>$</td>
<td></td>
<td></td>
</tr>
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<td></td>
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</tr>
<tr>
<td>Total Evaluated Price</td>
<td></td>
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Authorized Individual
Name

Company Name

Title

Company Tax ID #

* 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.

SUBMIT THIS WITH THE FINANCIAL RESPONSE
ATTACHMENT 2
TASK ORDER AGREEMENT

CATS TORFP # ADPICS PO NUMBER OF MASTER CONTRACT # 050R5800338

This Task Order Agreement ("TO Agreement") is made this day day of Month, 200X by and between MASTER CONTRACTOR and the STATE OF MARYLAND, TO Requesting Agency.

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 the Maryland Insurance Administration, as identified in the CATS TORFP # ADPICS PO.

   b. “CATS TORFP” means the Task Order Request for Proposals # ADPICS PO, dated MONTH DAY, YEAR, including any addenda.

   c. “Master Contract” means the CATS Master Contract between the Maryland Department of Budget and Management and MASTER CONTRACTOR dated December 19, 2005.

   d. “TO Procurement Officer” means TO Procurement Officer. 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 Maryland Insurance Administration and MASTER CONTRACTOR.

   f. “TO Contractor” means the CATS Master Contractor awarded this TO Agreement, whose principal business address is _______________________ and whose principal office in Maryland is ____________________.

   g. “TO Manager” means TO Manager of the Agency. The Agency may change the TO Manager at any time by written notice to the TO Contractor.

   h. “TO Proposal - Technical” means the TO Contractor’s technical response to the CATS TORFP dated date of TO Proposal – Technical.

   i. “TO Proposal – Financial” means the TO Contractor’s financial response to the CATS TORFP dated date of TO Proposal - FINANCIAL.


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 supercede 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 Proposal-Technical
d. Exhibit C – TO Proposal-Financial

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 insert time for performance, commencing on the date of Notice to Proceed and terminating on MONTH DAY, 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 $total amount of 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 Federal ID number. 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.

IN WITNESS THEREOF, the parties have executed this TO Agreement as of the date hereinabove set forth.
TO CONTRACTOR NAME

By: Type or Print TO Contractor POC Date

Witness: _______________________

STATE OF MARYLAND, TO REQUESTING AGENCY DEPARTMENT OF BUDGET AND MANAGEMENT, OFFICE OF INFORMATION TECHNOLOGY, APPLICATION SYSTEMS MANAGEMENT

By: insert name, TO Procurement Officer Date

Witness: _______________________

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ATTACHMENT 3

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 subconsultant 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 THIS WITH THE TECHNICAL RESPONSE
ATTACHMENT 4
LABOR CLASSIFICATION PERSONNEL RESUME SUMMARY

INSTRUCTIONS:

1. Master Contractors must comply with all personnel requirements under the Master Contract RFP 050R5800338.

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.

   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. In this case, 3 months.

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.
<table>
<thead>
<tr>
<th>Proposed Individual’s Name/Company:</th>
<th>How does the proposed individual meet each requirement?</th>
</tr>
</thead>
<tbody>
<tr>
<td>LABOR CLASSIFICATION TITLE – (INSERT LABOR CATEGORY NAME)</td>
<td></td>
</tr>
<tr>
<td>Education: (Insert the education description from the CATS RFP from section 2.12 for the applicable labor category.)</td>
<td></td>
</tr>
<tr>
<td>Experience: (Insert the experience description from the CATS RFP from section 2.12 for the applicable labor category.)</td>
<td></td>
</tr>
<tr>
<td>Duties: (Insert the duties description from the CATS RFP from section 2.12 for the applicable labor category.)</td>
<td></td>
</tr>
</tbody>
</table>

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

**Contractor’s Contract Administrator:**

Signature __________________________ Date ____________

**Proposed Individual:**

Signature __________________________ Date ____________
ATTACHMENT 5

DIRECTIONS TO THE PRE-TO PROPOSAL CONFERENCE

MARYLAND INSURANCE ADMINISTRATION
Maryland Insurance Administration
525 Saint Paul Place
Baltimore, Maryland 21202

The Maryland Insurance Administration is located about one mile north of the Inner Harbor on Saint Paul Place, which runs north to south between Calvert and Charles Streets, both of which are one-way northbound. Nearby landmarks include Mercy Hospital, the Washington Monument and the Sun Papers building.

BASIC DIRECTIONS

From the Inner Harbor, go north on Calvert Street to Monument Street (about eight traffic lights). For easy parking turn right on Monument Street and then immediately turn right into the Sunpapers garage. To drive directly to the MIA turn left on Monument Street and go up the hill one block to the traffic light on Saint Paul Street. Turn left on Saint Paul and stay in the left lane. Go one block and cross Centre Street; the MIA is on the left, in the yellow brick two-story building with green awnings.

FROM THE SOUTH ON THE BALTIMORE-WASHINGTON PARKWAY (I-295)

Take Russell Street exit to Pratt Street. Turn right onto Pratt Street and stay toward the left lane. Turn left onto Calvert Street. Follow the Basic Directions above for parking or to get to the MIA.

FROM THE SOUTH ON INTERSTATE 95

On I-95 heading north: do NOT take any exits for the tunnels or I-695, the Baltimore Beltway. Stay on I-95 and follow the signs for I-395, the downtown spur to Camden Yards and the Inner Harbor. Follow the signs to the Inner Harbor; I-395 will bring you to Conway Street. Bear right onto Conway Street; try to stay in the right lane, but before the third traffic light, move into the center lane. At the third traffic light turn left, and stay in the left-center lanes, which will lead you onto Calvert Street. Follow the Basic Directions above for parking or to get to the MIA.

FROM THE NORTH ON THE JONES FALLS EXPRESSWAY (I-83)

Heading south on the Jones Falls Expressway, take the Saint Paul Street exit, staying in the left lane of the exit ramp. Proceed south on Saint Paul Street, staying in the left lane. At Centre Street, where Saint Paul divides into an upper road (Light Street, up to the right) and a lower road (Saint Paul Place, down to the left), stay to the left. Cross Centre Street; the MIA is in the low two-story building on the left.

PARKING

Metered parking spaces (Quarters Only) usually are available nearby. If you cannot find a parking spot in front of or near the building, continue south on Saint Paul Place one block past the MIA to Franklin Street; turn left and go down the hill one block to Calvert Street. Turn left and go two traffic lights to Monument Street. Turn right on Monument Street and immediately turn right into the Sun Papers parking garage.
ATTACHMENT 6
ACCEPTANCE OF DELIVERABLE FORM

Agency Name: Maryland Insurance Administration

Project Name: Network and Server Infrastructure Upgrades

TO Manager: Paul Rudman 410.468.2062

To: TO Contractor’s Contract Manager

The following deliverable, as required by TO Agreement #ADPICS PO, 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

ISSUED BY THE TO MANAGER AS REQUIRED IN SECTION 2.2.3 OF THE TORFP
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 #ADPICS PO for TORFP Project Name. 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 described in Section 1.7 of the TORFP, 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 under Section 1.7, 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 Gisela Blades (TO Procurement Officer) Department of Budget and Management 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

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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 TO Requesting Agency (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 Project Name TORFP No. ADPICS PO dated release date for TORFP, (the "TORFP") issued under the Consulting and Technical Services procurement issued by the Department, Project Number 050R5800338; 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:                     Maryland Insurance Administration:

Name:_________________________________          Name:___________________________
Title:_________________________________           Title:___________________________
Date:_____________________________            Date:____________________________

SUBMIT AS REQUIRED IN SECTION 1.7 OF THE TORFP