



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

Vignette Systems Support Services

**CATS TORFP PROJECT E00P7200416
ISSUE DATE: December 19, 2006**

Comptroller of Maryland

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KEY INFORMATION SUMMARY SHEET

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. **All Master Contractors must complete and submit a Master Contractor Feedback form via the CATS web site regardless of whether a TO Proposal is submitted or not.** The form is accessible via, your CATS Master Contractor login screen and clicking on TORFP Feedback Response Form from the menu. In addition to the requirements of this TORFP, the Master Contractors are subject to all terms and conditions contained in the CATS RFP issued by the Maryland Department of Budget and Management (DBM), Office of Information Technology (OIT) and subsequent Master Contract Project Number 050R5800338, including any amendments.

TORFP Name:	Vignette Systems Support Services
Functional Area:	2) Web and Internet Services
TORFP Issue Date:	December 19, 2006
Closing Date and Time:	January 17, 2007 at 2:00 pm
TORFP Issuing Office:	Comptroller of Maryland, Information Technology Division
Questions and Proposals are to be sent to:	vignettetorfp@comp.state.md.us
TO Procurement Officer	John T. Salmon Office Phone Number: 410-260-7634 Office FAX Number: 410-974-2762
TO Manager:	Andrea Martin Office Phone Number: 410-260-6093 Office FAX Number: 410-974-8415
Project Number:	ADPICS Purchase Order Number (E00P7200416)
TO Type:	Time and Materials
Period of Performance:	One year / 2 one year options
MBE Goal:	35%
Primary Place of Performance:	108 Carroll Street Annapolis, MD 21404
State Furnish Work Site and/or Access to Equipment, Facilities or Personnel:	Office desk space with network connection will be provided when working onsite. TO Contractor must supply laptop computer with necessary software and appropriate security software that meets Computer Guidelines requirements. Appropriate access to network and Vignette systems will be provided.
TO Pre-Proposal Conference:	January 4, 2007 -- 10:00 a.m. Information Technology Division Building 108 Carroll Street, Room 407A Annapolis, MD PRE-REGISTRATION REQUIRED

ACRONYMS

CATS: Consulting and Technical Services
COIN: Comptroller's Office IntraNet
DPM: Dynamic Portal Module
DSM: Dynamic Site Module
IT: Information Technology
NTE: Not-to-exceed
TO: Task Order
TORPF: Task Order Request for Proposal
VAP: Vignette Application Portal
VCM: Vignette Content Management
WCM: Web Content Management

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 2.16 for information on change orders.

The TO Manager has the primary responsibility for the management of the work performed under the TO Agreement; administrative functions, including issuing written directions; ensuring compliance with the terms and conditions of the CATS Master Contract; 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 2, 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 the Comptroller of Maryland's e-mail system time stamp. The TO Proposal is to be submitted via e-mail to vignettetorfp@comp.state.md.us as two attachments in MS Word format. The "subject" line in the e-mail submission shall state the TORFP #E00P7200416. The first file will be the TO Proposal technical response to this TORFP and titled, "CATS TORFP # E00P7200416 Technical". The second file will be the financial response to this CATS TORFP and titled, "CATS TORFP # E00P7200416 Financial".

1.4 MINORITY BUSINESS ENTERPRISE (MBE)

A Master Contractor that responds to this TORFP shall complete, sign, and submit all required MBE documentation (Attachment 9 - MBE Forms D-1 and D-2) at the time it submits its TO Proposal(s). Any and all proposed MBE subcontractors must be certified by the State of Maryland as minority owned and controlled. A current MBE directory is available on the MD Dept of Transportation website, http://www.mdot.state.md.us/MBE_Program/index.html. **Failure of the Master Contractor to complete, sign, and submit all required MBE documentation at the time it submits its TO Proposal will result in the State's rejection of the Master Contractor's TO Proposal.**

1.5 eMARYLANDMARKETPLACE FEE

COMAR 21.02.03.06 requires that each Master Contractor who 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 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 Vignette Systems Support services and must do so impartially and without any conflicts of interest. Each Master Contractor submitting a proposal shall complete and include a Conflict of Interest Affidavit (Attachment 3 of 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 upon specific circumstances.

1.7 NON-DISCLOSURE AGREEMENT

Certain system documentation may be available for potential Offerors to review at 108 Carroll Street, Annapolis, MD. Offerors who review such documentation will be required to sign a Non-Disclosure Agreement (Attachment 7). Please contact the TO Procurement Officer of this TORFP to schedule an appointment.

In addition, certain documentation may be required by the TO Contractor awarded the TO Agreement in order to fulfill the requirements of the TO Agreement. The TO Contractor, employees and agents who review such documents will be required to sign a Non-Disclosure Agreement (Attachment 8).

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, AGENCY INFORMATION, AND BACKGROUND

2.1.1 PURPOSE

The Comptroller of Maryland is seeking a partner to provide time-and-materials technical expertise and support services for the following Vignette systems:

VCM: Vignette Content Management (version 7)

VAP: Vignette Application Portal

DSM: Dynamic Site Module

DPM: Dynamic Portal Module

The master contractor or sub-contractor will be expected to provide staffing on an as-needed basis to augment Comptroller of Maryland IT personnel. The number of staff, hours and duration may be regularly scheduled or calculated on a per project basis; therefore, schedules may be variable according to need. The master contractor or sub-contractor is expected to help assess such needs and schedules/hours of work will be determined cooperatively with Comptroller of Maryland IT personnel.

The TO Agreement resulting from this solicitation shall have a base term of one year. The Agency, at its sole option, shall have the unilateral right to extend the TO Agreement for two (2) additional one-year terms.

2.1.2 COMPTROLLER OF MARYLAND INFORMATION

The Comptroller of Maryland's Information Technology Division operates the Annapolis Data Center and provides information technology services for the Comptroller's agency. The Annapolis Data Center provides mainframe computing services for the Comptroller, thirteen major departments of State government, and many small agencies. Operating costs are reimbursed by the ADC's customer agencies.

The Information Technology Division provides server-based computing services for all divisions of the Comptroller of Maryland, in addition to operating and maintaining www.marylandtaxes.com, www.adc.state.md.us for the Annapolis Data Center, and the Comptroller's Office Intranet (COiN).

Additional information on the Comptroller of Maryland can be found at http://www.marylandtaxes.com/main/about_the_comptroller/anniversary/history.asp

2.1.3 VIGNETTE PROJECT BACKGROUND

The Comptroller of Maryland's Information Technology Division embarked on a project in early 2003 to implement web content management (WCM) in order to manage web site content for the Comptroller's Internet (www.marylandtaxes.com), and intranet (COiN) and to provide an enterprise portal for the intranet.

WCM was implemented with the goals of: (1) reducing IT workload by distributing responsibility for web page content management to the business unit owners and (2) paving the way for more dynamic and up-to-date web site content.

The Comptroller of Maryland is currently contracted with Vignette for product maintenance and defect support for the Vignette systems. The Contractor shall assist with implementing product updates and patches and work directly with Vignette technical support for problem diagnosis and resolution, and provide recommendations concerning patch management.

2.2 VIGNETTE IT ENVIRONMENT

The current Vignette environment is:

- The current product versions are: VCM 7.3.0.5, VAP 7.2 and DPM 2.0.
- VCM and VAP are running on a total of 3 servers on the Windows platform. The VCM Database is using MS-SQL2000/2003
- Custom file and image widgets are used within the VCM
- Custom deployment script is used to generate shtml files for the supported websites

2.3 PROFESSIONAL DEVELOPMENT

In order to maintain skills regarding the Vignette systems, the TO Contractor shall ensure continuing education for the personnel provided. This education should be related to the currently installed versions of the Vignette products and any upgrades/ enhancements applied during the term of the TO Agreement. Staff time and course costs shall be the responsibility of the TO Contractor.

2.4 TO CONTRACTOR PERSONNEL DUTIES AND RESPONSIBILITIES

2.4.1 SUPPORT SERVICES REQUIRED

2.4.1.1 TELEPHONE REQUEST CALLS

Telephone Request Call support service is “how to” technical support for Vignette product support.

The TO Contractor shall be available to answer “how to” questions, respond to issues, and offer technical support, expertise and advice. These services shall include, but are not limited to, providing technical expertise in the operation, customization, migration, implementation, and problem diagnosis and resolution of the Vignette systems. These services shall typically be required during normal business hours. However, with notice, the TO Contractor may also be asked to be available during non-business hours during critical situations, such as a system outage or during migration or testing.

The TO Contractor shall provide a toll free telephone number that the Agency will use to contact the TO Contractor, Monday through Friday from 8:00 a.m. through 5:00 p.m., excluding State holidays.

The TO Contractor, in agreement with the Agency, shall assign a priority rating for each telephone request call. The following priority ratings and accompanying response times must be utilized:

- **CRITICAL** – VCM application/system is down, e.g., APPLICATION ALERT.
Action Time Frame: Two work days
- **SERIOUS** – major problem, but there is a work-around for problem.
Action Time Frame: Four work days
- **MINOR** – minor problem, which does not significantly impact work.
Action Time Frame: Ten workdays to propose solution.
- **ROUTINE** – work orders, “non-problem” related requests for assistance, may be “how to” questions.
Action Time Frame: Five work days or more with concurrence of Agency.

The TO Contractor shall provide the following telephone request call services:

- 1) Live-voice response to first telephone request call by TO Contractor’s staff, which shall assign a telephone request tracking number to the call and, in agreement with the Agency, shall assign a priority rating for the telephone request.
- 2) The telephone request must be resolved within the action timeframes defined in item 2.4.1.1 above for the priority rating assigned the call.
- 3) When the TO Contractor initiates a call back by the appropriate technical staff, the call back must be made within four (4) hours of the Agency’s first telephone request call.

The TO Contractor shall resolve all telephone request calls in accordance with the action timeframes designated for the priority ratings.

The TO Contractor shall provide and utilize escalation procedures to resolve problems reported via a telephone request call.

The TO Contractor shall track all telephone request calls.

The TO Contractor shall submit weekly reports in MS Office format or HTML format by email to the Comptroller of Maryland that detail the current status of all telephone request calls.

The TO Contractor shall submit monthly invoices to the Agency for work performed in response to a telephone request call. The telephone request call tracking number must be included on the invoice with the other information required in Section 2.15 below.

2.4.1.2 WORK ORDER REQUESTS

Work Order Requests shall include, but are not limited to, providing technical expertise with system design, taxonomy and architecture design, coding, customization, performance, database setup, integration, security, documentation, planning and testing of the Vignette systems. Work Order Project tasks shall be determined and prioritized cooperatively between TO Contractor and the TO Manager.

The TO Manager shall submit Work Order Requests to the TO Contractor electronically via email, requesting that the TO Contractor respond to the request with a proposal.

Time and Materials (T&M) with a “not to exceed” (NTE) ceiling amount purchase orders may be issued under this contract, as appropriate to the type of services being requested.

The TO Contractor shall respond to a Work Order Request within the timeframe specified in the request, by email with all pertinent order information via a proposal. The timeframe for the response to the Work Order Request shall be dependent upon the complexity of the request, but shall not be greater than thirty (30) business days.

The TO Contractor’s proposal shall include but not be limited to the task(s) to be performed and the timeframe in which it will be performed.

The TO Contractor’s proposal shall identify the labor categories for the personnel performing the task. The TO Contractor shall list the projected monthly hours and the hourly rate for each of these individuals with an average monthly total and a total for the entire period of performance as a “not to exceed” (NTE) ceiling amount for the work to be accomplished under the proposal. Any work performed by the TO Contractor in excess of the NTE ceiling amount of any approved Work Order Request Proposal without the prior written approval of the TO Procurement Officer is at the TO Contractor’s risk of non-payment.

Upon receipt of the proposal the TO Manager shall review the TO Contractor’s proposal, work with the TO Contractor as necessary, and approve the TO Contractor’s proposal via email. Any Work Order Request Proposal not approved by the TO Manager shall not be considered valid and will require the TO Contractor expedite follow-up communication to the TO Procurement Officer within one business day.

2.4.1.3 SAMPLE WORK ORDER REQUESTS

The following are examples of tasks for which the TO Contractor may receive a Work Order Request.

- **Year 1**
 - Immediate response to assist with resolving system outages/failures.
 - Respond to troubleshooting requests with any/all Vignette system functionality.
 - Current list:
 - Creation, configuration and implementation of roles, groups and permissions within the VCM.
 - Resolve issues with VCM custom coding & deployment script coding.
 - Resubmission of static files
 - Resolve issues with widget functionality within eWebEditPro.
 - Correct code to open links in new window.
 - Correct coding errors in creating lists of hyperlinks
 - Troubleshoot why deleting a table cell causes shutdown of Management Console under specific circumstances.
 - Test and install patches & Version upgrades of VCM, VAP, and ancillary software (CDS, DPM, etc...)
 - Assistance with/recommendations for:
 - navigational architecture,
 - template design,

- system configuration, database configuration, stage configuration,
 - migration strategy,
 - workflows,
 - user authorization, and
 - general system functionality as pertains to maximizing the features and accommodating the limitations of the system.
- **Year 2**
 - Respond to troubleshooting requests with any/all Vignette system functionality.
 - Immediate response to assist with resolving system outages/failures.
 - Test and install patches & Version upgrades of VCM, VAP, and ancillary software (CDS, DPM, etc...)
 - Documentation & change control logs for the purpose of our staff to use as future reference in accomplishing same tasks.
 - Creation of Disaster Recovery plan and installation scripts and documentation.
 - Creation/implementation of new production delivery stage and management stage.
 - Modify custom coding within the VCM and the deployment script.
 - Modify and enhance current configuration of database, endpoints and delivery stages
 - Creation/implementation of new functionality as well as new sites, custom code, custom deployment scripts, etc.
 - Modification/creation of xml/xsl for content & styles.
 - **Year 3**
 - Respond to troubleshooting requests with any/all Vignette system functionality.
 - Test and install patches & Version upgrades of VCM, VAP, and ancillary software (CDS, DPM, etc...)
 - Immediate response to assist with resolving system outages/failures.
 - Research and Design new deployment script/method using new features and functionality within the VCM
 - Modify and enhance functioning of widgets, content types, objects, gui's, portlets
 - Creation/implementation of new functionality as well as new sites, custom code, custom deployment scripts, etc.
 - Customization & personalization in VAP to take advantage of the features for customer & employee use.

2.4.2 FAMILIARITY WITH WEBSITES AND TAXONOMIES

The TO Contractor will be expected to become familiar with the Comptroller of Maryland's Internet and Intranet web sites, and develop a good understanding of the taxonomies.

2.4.3 CUSTOM SCRIPTING PROPERTY OF THE STATE

All customized coding and scripting developed by the TO Contractor on behalf of the Comptroller of Maryland under this TORFP shall become the property of the State.

2.4.4 KNOWLEDGE TRANSFER

The TO Contractor shall work with Comptroller of Maryland IT staff members on tasks to provide knowledge transfer so that they can improve their skills and develop technical expertise in supporting the Vignette systems. For example:

- This is how I fixed the problem; this is how I located the problem.
- This is how I made the modification/upgrade.
- This is how a(n) XXX is created/implemented.

2.5 PERFORMANCE EVALUATION AND STANDARDS

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

2.6 MITIGATION PROCEDURES

Should an evaluation of any TO Contractor's personnel indicate poor or non-performance, the TO Manager will follow the established mitigation process included as Exhibit C, prior to requesting that the TO Contractor provide a replacement employee.

2.7 WORK HOURS

- 1) The TO Contractor's personnel will be required to work onsite at the Annapolis office during normal business hours, which are 8:00 a.m. to 5:00 p.m., Monday through Friday, excluding State holidays. The TO Contractor may also work remotely, at the discretion of the TO manager, based upon the current work requirements.
- 2) Services may also require evening, weekend and/or holiday hours performing planned system upgrades in addition to normal business-day hours. Hours performing system upgrades will be billed on actual time worked at the rates proposed.
- 3) Services may occasionally require non-normal business hours to resolve critical problems that affect production systems.

2.8 DELIVERABLES

1) Personnel

The TO Contractor shall be responsible for providing, for all assigned tasks, the personnel required in this TORFP within the timeframe required as specified by the TO Manager.

2) Weekly Status Report

At the conclusion of each work week, the TO Contractor shall be responsible for compiling and submitting to the TO Manager, a status report that summarizes the following:

- Assigned work efforts and status (completed, in progress, on-hold), issues identified and issues resolved.
- Emergency work efforts and issues identified.
- Proposed activities for the upcoming workweek.
- Hours worked by individual TO Contractor personnel.

3) Documentation and Source Code

As work is completed, the TO Contractor is responsible for providing all documentation and source code to the TO Manager in a timely manner.

4) Status Meetings

The TO Contractor shall be required to attend status meetings at the Annapolis office as requested and required by current project tasks.

2.9 REQUIRED POLICIES, GUIDELINES AND METHODOLOGIES

The TO Contractor shall be required to comply with all applicable laws, regulations, policies, standards and guidelines affecting information technology work, 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 work execution. These may include, but are not limited to:

- 1) The State's System Development Life Cycle (SDLC) methodology at: www.dbm.maryland.gov - keyword: SDLC.
- 2) The State Information Technology Security Policy and Standards at: www.dbm.maryland.gov - keyword: Security Policy.
- 3) The State Information Technology Project Oversight at: www.dbm.maryland.gov - keyword: IT Project Oversight.
- 4) The State of Maryland Enterprise Architecture at www.dbm.maryland.gov - keyword: MTAF Guiding Principles.
- 5) The TO Awardee, its employees and subcontractors who will be performing services under this TORFP shall obtain "Applicant/Employee Security Clearances" from the Maryland Department of General Services Police. The DGS security clearance involves a review and full disclosure of all criminal records. The TO Contractor must contact the DGS Police, 29 Saint John's Street, Annapolis, Maryland 21401, telephone (410) 260-2911; fax (410) 974-2224 to obtain the security authorization forms.
- 6) The TO Awardee, its employees and subcontractors who will be performing services under this TORFP must sign the confidentiality agreement (Exhibit D).

2.10 TO CONTRACTOR PERSONNEL MINIMUM QUALIFICATIONS

Since the purpose of this Task Order is specifically to provide expertise with the Vignette Content Management System and Enterprise Portal, the TO Contractor or sub-contractor personnel must be highly versed, trained, and skilled, with practical experience in all aspects

of the current versions of the Vignette systems and underlying technologies. The contractor shall commit to maintaining skill levels in current and future versions of the Vignette products.

Individuals proposed for this TORFP must have at least three years of work experience with the following Vignette systems:

- VCM: Vignette Content Management (version 7)
- VAP: Vignette Application Portal
- DSM: Dynamic Site Module
- DPM: Dynamic Portal Module

Additionally, the individuals proposed to provide services under this TORFP must have three years of experience in the following technical areas:

- Active Directory
- General working knowledge of networking, TCP/IP, Internet, and web sites
- Windows Server 2003
- Windows Services
- IIS
- Server Security
- Java technologies
- HTML, ASP, .NET
- SQL
- Information architecture and taxonomy construction
- Backup and Recovery

2.11 TO CONTRACTOR EXPERTISE REQUIRED

The TO Contractor shall be capable of furnishing all necessary services required to successfully complete all tasks and work requirements and produce high quality deliverables described herein. The TO Contractor shall demonstrate, in its proposal, that it possesses such expertise in-house or has fostered strategic alliances with other firms for providing such services.

The TO Contractor personnel must demonstrate a high level of technical expertise and practical experience in all aspects of installing and supporting Vignette systems, and must possess good communications skills.

2.12 TO CONTRACTOR REFERENCES

The TO Contractor shall provide, with its proposal, a minimum of three (3) references for the service provider (TO Contractor and/or proposed subcontractor) from clients for whom they have provided Vignette support services similar to that contemplated by this TORFP. When submitting its proposal, the TO Contractor should complete Attachment 10 - Client Reference Contacts.

2.13 SUBSTITUTION OF PERSONNEL

The TO Contractor shall only propose staff who satisfy the personnel qualifications specified in the Master Contract and who are available at the time of the TO Proposal. In addition, the

TO Contractor shall abide by the substitution of personnel requirements in the Master Contract, Section 2.11.

2.14 NON-PERFORMANCE OF PERSONNEL

In the event that the TO Manager is dissatisfied with the TO Contractor's personnel for not performing to the specified standards in Section 2.4, the TO Contractor personnel may be removed at the TO Manager's discretion. Both parties will be in full communication as to the nature of the dissatisfaction and previous mitigation efforts included in Section 2.6. Replacement personnel must have qualifications equal to or greater than that of the non-performing person initially proposed and evaluated and accepted in the TO Agreement. The TO Manager will determine the amount of time the TO Contractor has to provide a replacement.

2.15 INVOICING

Invoices shall be submitted monthly when work is performed. Invoices will reflect costs for hours worked indicated in the accompanying weekly status reports. Upon verification and acceptance of the invoices by the TO Manager, payment will be made to the TO Contractor.

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 6, is not submitted.

Telephone Request Call hours would be billed based on actual time worked.

2.15.1 INVOICE SUBMISSION PROCEDURE

- 1) This procedure consists of the following requirements and steps:
- 2) The invoice shall identify the Comptroller of Maryland 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.
- 3) The TO Contractor shall send the original of each invoice and supporting documentation (itemized billing reference for employees, including detail of work hours) submitted for payment to the Comptroller of Maryland at the following address:

**Information Technology Division
P. O. Box 2367
Annapolis, MD 21404 – 2367
Attn: Fiscal Services**

- 4) 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 accordance with the terms and conditions of the CATS master contract, invoices must be submitted no later than 60 calendar days from the TO Agreement termination date.

2.16 CHANGE ORDERS

If the TO Contractor is required to perform additional work outside the scope of this TORFP, or there is a work reduction due to unforeseen scope changes, a TO Change Order will be initiated. The TO Contractor and TO Manager shall negotiate a mutually acceptable price modification based on the TO Contractor's proposed rates in the Master Contract and scope of the work change. No scope of work modifications shall be performed until a change order is approved by DBM and 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 and 2) a completed Master Contractors' Feedback Form submitted electronically off the CATS web site.

3.2 FORMAT

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

3.2.1 THE TECHNICAL PORTION OF THE TO PROPOSAL SHALL INCLUDE:

A) Proposed Services

- 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.

B) Proposed Personnel

- 1) Identify and provide resumes for all proposed personnel by labor category.
- 2) Documentation that all proposed personnel meet the minimum required qualifications and possess the required certifications in Sections 2.9, 2.10, and 2.11.
- 3) Complete and provide Attachment 4 – Labor Classification Personnel Resume Summary.
- 4) Provides the names and titles of all key management personnel who will be involved with supervising the individuals rendering services under this TO Agreement.

C) Subcontractors

- 1) Identify all proposed subcontractors, including MBEs, and their full roles in the performance of this TORFP Scope of Work. (See TO Contractor Minority Business Enterprise Reporting Requirements – Attachment 9 – for details).
- 2) All required MBE documentation (Attachment 9 - MBE Forms D-1 and D-2).

D) Master Contractor and Subcontractor Experience and Capabilities

- 1) Provide examples of work assignments that the proposed personnel have completed that were similar in scope to the one defined in this TORFP. Each of the 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 proposed personnel are still providing these services and, if not, an explanation of why services are no longer provided to the client organization.
- 2) State of Maryland Experience: If applicable, the Master Contractor shall submit a list of all contracts it currently holds or has held within the past five years with any government entity of the State of Maryland. For each identified contract, the Master Contractor shall provide:
- a) The State contracting entity,
 - b) A brief description of the services/goods provided,
 - c) The dollar value of the contract,
 - d) The term of the contract,
 - e) Whether the contract was terminated prior to the specified original contract termination date,
 - f) Whether any available renewal option was not exercised,
 - g) The State employee contact person (name, title, telephone number and e-mail address).

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

E) State Assistance

- 1) Provide an estimate of expectation concerning participation by State personnel.

F) 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 PROPOSAL

For evaluation purposes, offerors are asked to base their cost proposal based on the assumption of providing 200 hours of technical support in the base year and in each option year of the contract. Offerors are required to allocate the 200 hours among the task-appropriate (see Sect. 2.4.1.3, Sample Work Order Requests) labor categories of their choosing. Similarly, Offerors must propose, after self-determination, the time and material costs required to support the 200 hours of technical support per year.

The financial 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 Master Contractor should indicate on Attachment 1 the appropriate labor category being proposed, and the fixed hourly labor category rate. Proposed rates are not to exceed the rates defined in the Master Contract.

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 Comptroller of Maryland 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:

- The TO Contractor's proposed personnel's experience as outlined in Section 2.4 – TO Contractor Personnel Duties and Responsibilities
- The TO Contractor's proposed personnel's qualifications as outlined in Section 2.10 & 2.11 – TO Contractor Personnel Minimum Qualifications
- The TO Contractor's references as outlined in Section 2.12.
- The resumes of and interviews with the personnel proposed by the TO Contractor as outlined in Attachment 4.

4.3 SELECTION PROCEDURES

- 1) Proposed personnel will be assessed for compliance with the minimum qualifications in Section 2.10 of the TORFP. Master Contractors' proposing personnel who fail to meet the minimum qualifications will be disqualified and their proposals eliminated from further consideration.
- 2) 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.
- 3) The Comptroller of Maryland will conduct interviews of all personnel proposed in each TO Proposal that meets minimum qualifications.
- 4) Qualified TO Proposal financial responses will be reviewed and ranked from lowest to highest price proposed.
- 5) 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 (NTP) authorized by the TO Procurement Officer.

EXHIBIT A – TO CONTRACTOR’S EMPLOYEES AND AGENTS WHO WILL BE GIVEN ACCESS TO THE CONFIDENTIAL INFORMATION

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

Signature

Date

EXHIBIT B – STANDARDS FOR SATISFACTORY PERFORMANCE

- Successfully completes tasks professionally, expediently and on time.
- Successfully maintains high levels of quality and thoroughness and with minimal disruption of service.
- Successfully maintains the use of best practices and innovative approaches to completing tasks.
- Successfully adheres to State security and project management policies.
- Successfully provides knowledge transfer to IT staff while working on tasks.
- Successfully communicates both verbally and written with state IT staff, and is responsive to questions and requests.
- Successfully develops well thought-out plans, coordinates activities to meet objectives, and maintains well-organized methods of completing work assignments.
- Successfully provides comprehensive and well-written documentation.
- Successfully maintains excellent work and attendance/punctuality habits by being on time and available according to prearranged work schedules.

EXHIBIT C – MITIGATION PROCEDURES

In the event the contractor fails to meet the expectation of the customer, the following mitigation steps will be followed.

- 1) TO Manager will notify the contractor and contractor personnel of the problem (i.e. failure to meet deadlines, poor work quality). This will be done in writing in the form of a letter provided in this attachment.
- 2) TO Manager may elect to discuss the problem directly with the contractor personnel or with both contractor and contractor personnel to determine the course of action to be taken to resolve the problem and the time frame to resolve it.
- 3) At the end of the time frame allowed to resolve the problem, the customer will notify the contractor that:
 - o The problem has been resolved and there is no longer a need to track this problem
 - o The problem is partially resolved and the customer is extending the time to resolve the problem
 - o The problem is not resolved and the customer wishes to replace the contractor personnel with another resource agreed upon by both the contractor and customer as outlined in 2.12 Non-Performance of Personnel.

Note:

Any infraction of a violent or criminal nature shall not follow the above mitigation process. The contractor shall provide a replacement resource upon notification from the customer that an act of violence or of a criminal nature has occurred.

Sample Mitigation Letter

Date:

CATS TORFP PROJECT NUMBER E00P7200416

To: TO Contractor

From: TO Manager

SUBJECT: Initiation of Mitigation Or Request for Replacement Resource

The purpose of this letter is to inform you that the Comptroller of Maryland has:

___ initiated the mitigation process for a contractor resource
___ is requesting a replacement resource due to a Violent or Criminal act.

Description of problem:

TO Manager will describe the problem.

Mitigation steps where applicable:

TO Manager and contractor personnel / contractor will outline the steps to be taken to resolve the problem.

If the problem is of a Violent or Criminal nature, the customer shall indicate that no mitigation will be applied.

The contractor shall provide another resource at this time.

TO Manager Resolution Date:

TO Manager will assign a date when the problem is to be resolved. If the problem is not resolved by this date the TO Manager may elect to extend the mitigation period or request a new resource from the contractor.

EXHIBIT D – CONFIDENTIALITY AGREEMENT

**STATE OF MARYLAND
COMPTROLLER OF MARYLAND**

Subject to the Maryland Public Information Act and any other applicable laws, all confidential or proprietary information and documentation relating to either the Comptroller of Maryland or the Contractor (including without limitation, any information or data stored within the Contractor’s computer systems) shall be held in absolute confidence by the other party. Each party shall, however, be permitted to disclose relevant confidential information to its officers, agents and employees to the extent that such disclosure is necessary for the performance of their duties under this TO Agreement, provided that the data may be collected, used, disclosed, stored and disseminated only as provided by and consistent with the law. The provisions of this section shall not apply to information that (a) is lawfully in the public domain; (b) has been independently developed by the other party without violation of this TO Agreement; (c) was already in the possession of such party, (d) was supplied to such party by a third party lawfully in possession thereof and legally permitted to further disclose the information; or (e) which such party is required to disclose by law.

The Comptroller of Maryland is responsible for confidential personal and business information contained in tax returns, records, or reports. Confidentiality of tax information is required by the Tax-General Article, Section 13-202. In addition, provisions of the Criminal Law article make it a crime to make false entries to certain public records (Section 8-606) and to access, without authority, computers, computer networks, and computer databases (Section 7-302).

Violation of any of these provisions will result in legal action against you. Noncompliance with these provisions is considered a crime and is punishable under the law by a fine and/or imprisonment.

By signing below, you indicate that you have read and understand the requirements of this Confidentiality Agreement:

SIGNATURE: _____ DATE: _____

NAME (PLEASE PRINT): _____

COMPANY NAME: _____

ATTACHMENT 1 - PRICE PROPOSAL

YEAR 1 (BASE) PROPOSAL FOR 200 HOURS OF TECHNICAL SUPPORT WITH ASSOCIATED TIME AND MATERIALS			
Labor Categories	Hourly Labor Rate	Annual Hours Proposed by Category	Proposed Price By Category
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$
Total Annual Hours Proposed (NTE 200 hours)			
Total Proposed Price for 200 Hours of Technical Support in Year 1			\$
Total Proposed Price T&M and Administration/Management to Support provision of 200 hours Of technical support.			\$
Total Proposed Price in Year 1 for 200 Hours of Technical Support and Associated Time & Materials			\$

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. Time for travel will be reimbursed as allowed in Section 2.2.4 of the Master Contract.

YEAR 2 (OPTION) PROPOSAL FOR 200 HOURS OF TECHNICAL SUPPORT WITH ASSOCIATED TIME AND MATERIALS			
Labor Categories	Hourly Labor Rate	Annual Hours Proposed by Category	Proposed Price By Category
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$
Total Annual Hours Proposed (NTE 200 hours)			
Total Proposed Price for 200 Hours of Technical Support in Year 2 (OPTION YEAR)			\$
Total Proposed Price For T&M and Administration/Management to Support Provision of 200 Hours of Technical Support			\$
Total Proposed Price in Year 2 for 200 Hours of Technical Support and Associated Time & Materials			\$

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. Time for travel will be reimbursed as allowed in Section 2.2.4 of the Master Contract.

YEAR 3 (OPTION) PROPOSAL FOR 200 HOURS OF TECHNICAL SUPPORT WITH ASSOCIATED TIME AND MATERIALS			
Labor Categories	Hourly Labor Rate	Annual Hours Proposed by Category	Proposed Price By Category
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$
Total Annual Hours Proposed (NTE 200 hours)			
Total Proposed Price for 200 Hours of Technical Support in Year 3 (OPTION YEAR)			\$
Total Proposed Price For T&M and Administration/Management to Support Provision of 200 Hours of Technical Support			\$
Total Proposed Price in Year 3 for 200 Hours of Technical Support and Associated Time & Materials			\$

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. Time for travel will be reimbursed as allowed in Section 2.2.4 of the Master Contract.

SUMMARY FINANCIAL PROPOSAL THREE YEARS (BASE PLUS TWO OPTIONS) 200 ANNUAL HOURS OF TECHNICAL SUPPORT WITH ASSOCIATED TIME AND MATERIALS COSTS	
TOTAL PROPOSED PRICE FOR YEAR 1 (BASE)	\$
TOTAL PROPOSED PRICE FOR YEAR 2 (OPTION)	\$
TOTAL PROPOSED PRICE FOR YEAR 3 (OPTION)	\$
GRAND TOTAL, BASE PLUS TWO OPTIONS:	\$

Authorized Individual Name

Company Name

Title

Corporate Federal Tax ID No.

NOTE: The 200 annual hours of technical support are for TORFP Financial Proposal evaluation purposes only.

ATTACHMENT 2 – TASK ORDER AGREEMENT

CATS TORFP # E00P7200416.
OF MASTER CONTRACT # 050R5800338

This Task Order Agreement (“TO Agreement”) is made this day of Month, 200X by and between MASTER CONTRACTOR and the STATE OF MARYLAND, Comptroller of Maryland.

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 Comptroller of Maryland, as identified in the CATS TORFP # E00P7200416.
- B) “CATS TORFP” means the Task Order Request for Proposals # E00P7200416, dated December 15, 2006, 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 John T. Salmon. The Agency may change the TO Procurement Officer at any time by written notice to the TO Contractor.
- E) “TO Agreement” means this signed TO Agreement between the Comptroller of Maryland and MASTER CONTRACTOR.
- F) “TO Contractor” means the CATS Master Contractor awarded this TO Agreement, whose principal business address is (MAIN ADDRESS) and whose principal office in Maryland is (MARYLAND ADDRESS)
- G) “TO Manager” means Andrea Martin 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.
- J) “TO Proposal” collectively refers to the TO Proposal – Technical and 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 supersede the Master Contract.

2.2 The TO Contractor shall, in full satisfaction of the specific requirements of this TO Agreement, provide the services set forth in Section 2 of the CATS TORFP. These services shall be provided in accordance with the Master Contract, this TO Agreement, and all Exhibits and Attachments, 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:

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 one year, commencing on the date of Notice to Proceed (NTP) 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 the amount of the # E00P7200416. 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 2.15 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 Information Technology Division P. O. Box 2367 Annapolis, MD 21404 – 2367, Attn: Fiscal Services

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, COMPTROLLER OF MARYLAND, OFFICE OF INFORMATION TECHNOLOGY

By: John T. Salmon, TO Procurement Officer

Date

Witness: _____

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 sub consultant at any tier, and also includes an employee or agent of any of them if the employee or agent has or will have the authority to control or supervise all or a portion of the work for which a bid or offer is made.

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

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

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

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

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

SUBMIT 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.
- 4) 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.
- 5) Each form also includes examples of duties to perform. The proposed person must be able to fulfill those duties.
- 6) 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.
- 7) Additional information may be attached to each Labor Category Personnel Resume Summary that may assist a full and complete understanding of the individual being proposed.

**ATTACHMENT 4 – LABOR CLASSIFICATION PERSONNEL RESUME SUMMARY
(CONTINUED)**

Proposed Individual's Name/Company:	How does the proposed individual meet each requirement?
LABOR CLASSIFICATION TITLE – (INSERT LABOR CATEGORY NAME)	
Education: (Insert the education description from the CATS RFP from section 2.3 for the applicable labor category.)	
Experience: (Insert the expertise description from the CATS RFP from section 2.10 & 2.11 for the applicable labor category.)	
Duties: (Insert the duties description from the CATS RFP from section 2.4 for the applicable labor category.)	

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

SUBMIT THIS WITH THE TECHNICAL RESPONSE

ATTACHMENT 5 – DIRECTIONS TO THE PRE-PROPOSAL CONFERENCE

January 4, 2007 -- 10:00 a.m.

INFORMATION TECHNOLOGY DIVISION BUILDING
108 CARROLL STREET, ROOM 407A
ANNAPOLIS, MD

FROM BALTIMORE AREA:

Take the Baltimore Beltway to Route 97 south, follow I-97 south until it merges with Route 50 East

Take Route 50 East (approximately 1 mile)

Take exit 24 (Route 70 South/Rowe Blvd.)

Bear to the right toward Annapolis South.

FROM THE WASHINGTON, DC AREA:

Take the Washington Beltway to Route 50 East

Continue on Route 50 East to exit 24

Take exit 24 (Route 70 South/Rowe Blvd.)

Bear to the right toward Annapolis South.

FROM ROUTE 70 SOUTH/ROWE BLVD:

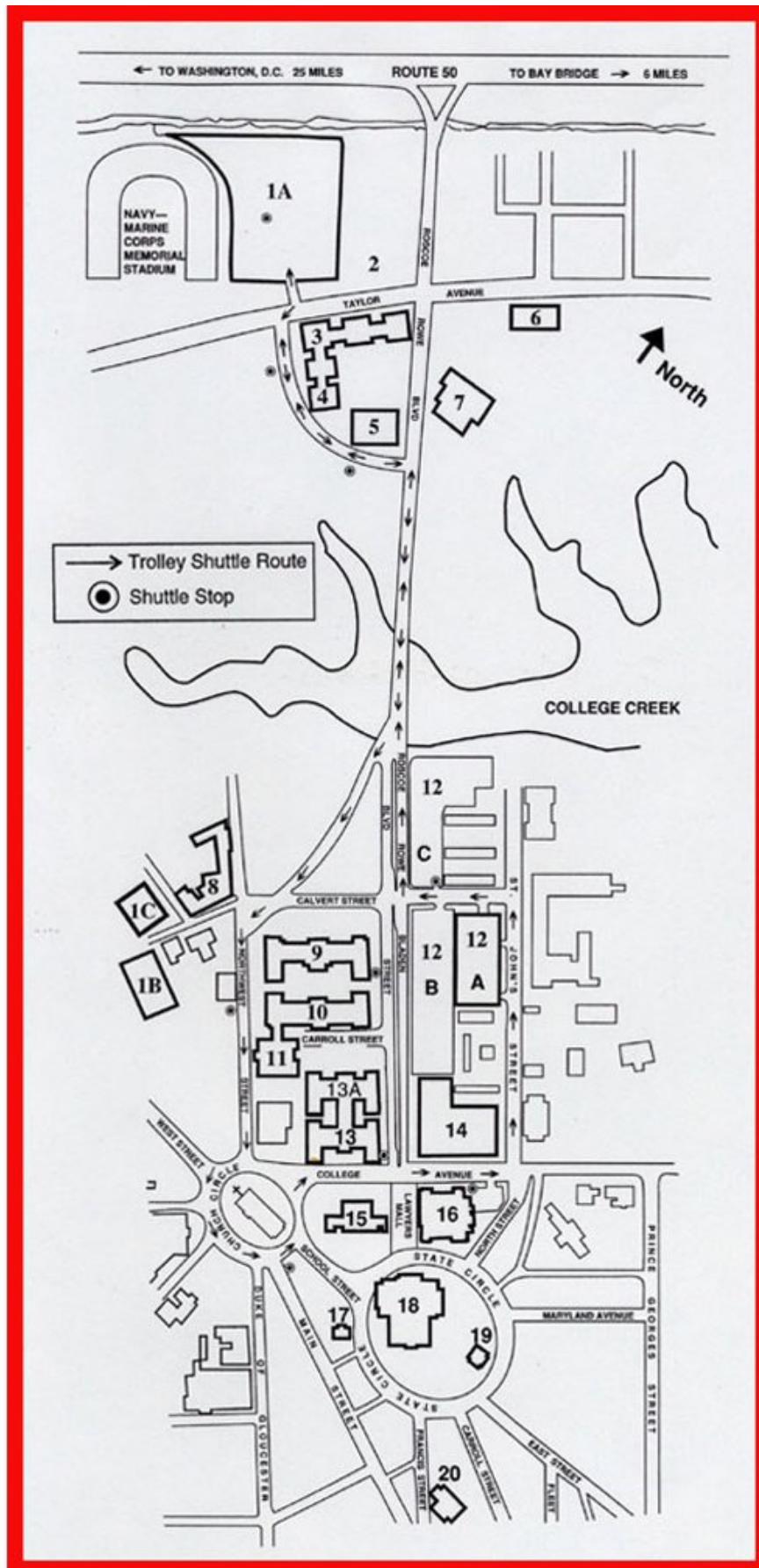
Come through two lights (less than 1 mile) then the road will bear to the right

At the next traffic light (Calvert Street) either turn right onto Calvert Street (at the light, on your left is the Louis L. Goldstein Treasury Building with white marble steps) or go straight through light on Northwest Street. If you continue on Northwest Street, on the right halfway up the block you will see an entrance to the Gotts Parking Garage. Alternatively, one can make the right at the light onto Calvert and another quick right onto Clay to enter the Whitmore Parking Garage.

The Information Technology Division building is the third red brick State office building flanking the left-hand side of Northwest Street which, at the end, spills into Church Circle. Before reaching Church Circle and the Post Office parking lot on your left, please a walkway that runs perpendicular to the street and hugs the side of the 3rd brick building. Take the steps down and follow the walkway around to the first front door on your left. You have arrived at the Information Technology Division building located at 108 Carroll Street.

The guard at the front desk will, after assigning you the appropriate credentials, direct you to the meeting room.

**You must pre-register, 24 hours prior to the pre-proposal conference.
Each member of your company must register.**



- 1A. Public Parking Lot at Navy-Marine Corps Memorial Stadium. *Trolley Shuttle Bus* runs from Stadium Parking Lot every 20 minutes (every 10 minutes at rushhour): Monday-Friday, 6:30am-8:00pm (weekends, May-Oct. only, 10am-7pm). Public parking also available off Calvert St.
- 1B. Gott's Court Garage
- 1C. Whitmore Garage
- 2. Sweeney District Court Building
- 3. Tawes State Office Building
- 4. Maryland Judicial Center
- 5. Murphy Courts of Appeal Building
- 6. State Police Barracks
- 7. State Archives (new Hall of Records)
- 8. Dept. of Budget & Management
- 9. Goldstein Treasury Building
Comptroller of Maryland
State Treasurer
- 10. State Income Tax Building
- 11. Annapolis Data Center Building
- 12. Central Services Building
Annapolis Public Buildings & Grounds
(parking at Lots A, B, & C by permit only)
- 13. James Senate Office Building
- 13A. Miller Senate Office Building
- 14. Lowe House of Delegates Office
- 15. Government House
- 16. Legislative Services Building
- 17. Shaw House
- 18. State House
Senate
House of Delegates
Governor's Office
Information Desk
Visitors Center
- 19. Old Treasury Building
- 20. Jeffrey Building
Secretary of State Maryland Higher Education Commission

ATTACHMENT 6 – ACCEPTANCE OF DELIVERABLE FORM

Agency Name: Comptroller of Maryland

TORFP Title: Vignette Support Services

TO Manager: TBD

To: TO Contractor’s Contract Manager

The following deliverable, as required by TO Agreement # E00P7200416, 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 2.15 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 # E00P7200416 for Vignette Systems Support Services. 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 the TO Procurement Officer on or before the due date for Proposals.
- 4) OFFEROR acknowledges that the disclosure of the Confidential Information may cause irreparable harm to the State and agrees that the State may obtain an injunction to prevent the disclosure, copying, or other impermissible use of the Confidential Information. The State's rights and remedies hereunder are cumulative and the State expressly reserves any and all rights, remedies, claims and actions that it may have now or in the future to protect the Confidential Information and/or to seek damages for the OFFEROR'S failure to comply with the requirements of this Agreement. The OFFEROR consents to personal jurisdiction in the Maryland State Courts.
- 5) In the event the State suffers any losses, damages, liabilities, expenses, or costs (including, by way of example only, attorneys' fees and disbursements) that are attributable, in whole or in part to any failure by the OFFEROR or any employee or agent of the OFFEROR to comply with the requirements of this Agreement, OFFEROR and such employees and agents of OFFEROR shall hold harmless and indemnify the State from and against any such losses, damages, liabilities, expenses, and/or costs.
- 6) This Agreement shall be governed by the laws of the State of Maryland.
- 7) OFFEROR acknowledges that pursuant to Section 11-205.1 of the State Finance and Procurement Article of the Annotated Code of Maryland, a person may not willfully make a false or fraudulent statement or representation of a material fact in connection with a procurement contract. Persons making such statements are guilty of a felony and on conviction subject to a fine of not more than \$20,000 and/or imprisonment not exceeding 5 years or both. OFFEROR further acknowledges that this Agreement is a statement made in connection with a procurement contract.
- 8) The individual signing below warrants and represents that they are fully authorized to bind the OFFEROR to the terms and conditions specified in this Agreement. If signed below by an individual employee or agent of the OFFEROR under Section 2 of this Agreement, such

individual acknowledges that a failure to comply with the requirements specified in this Agreement may result in personal liability.

OFFEROR: _____ BY: _____

NAME: _____ TITLE: _____

ADDRESS: _____

SUBMIT AS REQUIRED IN SECTION 1.7 OF THE TORFP

ATTACHMENT 8 - NON-DISCLOSURE AGREEMENT (TO CONTRACTOR)

THIS NON-DISCLOSURE AGREEMENT ("Agreement") is made as of this ___ day of _____, 200__, by and between the State of Maryland ("the State"), acting by and through its Comptroller of Maryland (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 Vignette Systems Support Services TORFP No. E00P7200416 dated December 15, 2008, (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:

Name: _____

Title: _____

Date: _____

Comptroller of Maryland:

Name: _____

Title: _____

Date: _____

SUBMIT AS REQUIRED IN SECTION 1.7 OF THE TORFP

ATTACHMENT 9 - TO CONTRACTOR MINORITY BUSINESS ENTERPRISE REPORTING REQUIREMENTS

CATS TORFP # E00P7200416

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

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

FORM D – 1 - Certified MBE Utilization and Fair Solicitation Affidavit

This document shall be included with the submittal of the Offeror's TO Proposal. If the Offeror fails to submit this form with the TO Proposal, the TO Procurement Officer shall determine that the Offeror's TO Proposal is not reasonably susceptible of being selected for award.

In conjunction with the offer submitted in response to TORFP No. E00P7200416, I affirm the following:

- 1) I acknowledge the overall certified Minority Business Enterprise (MBE) participation goal of 10 percent and, if specified in the TORFP, sub-goals of N/A percent for MBEs classified as African American-owned and N/A percent for MBEs classified as women-owned. I have made a good faith effort to achieve this goal.

OR

- 2) After having made a good faith effort to achieve the MBE participation goal, I conclude that I am unable to achieve it. Instead, I intend to achieve an MBE goal of _____ percent and request a waiver of the remainder of the goal. If I am selected as the apparent TO Agreement awardee, I will submit written waiver documentation that complies with COMAR 21.11.03.11 within 10 business days of receiving notification that our firm is the apparent low bidder or the apparent awardee.
- 3) I have identified the specific commitment of certified Minority Business Enterprises by completing and submitting an MBE Participation Schedule (Attachment - Form D-2) with the proposal.
- 4) I acknowledge that the MBE subcontractors/suppliers listed in the MBE Participation Schedule will be used to accomplish the percentage of MBE participation that I intend to achieve.
- 5) I understand that if I am notified that I am the apparent TO Agreement awardee, I must submit the following documentation within 10 working days of receiving notice of the potential award or from the date of conditional award (per COMAR 21.11.03.10), whichever is earlier.
 - a. Outreach Efforts Compliance Statement (Attachment D-3)
 - b. Subcontractor Project Participation Statement (Attachment D-4)
 - c. MBE Waiver Documentation per COMAR 21.11.03.11 (if applicable)
 - d. Any other documentation required by the TO Procurement Officer to ascertain Offeror's responsibility in connection with the certified MBE participation goal.

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

- 6) In the solicitation of subcontract quotations or offers, MBE subcontractors were provided not less than the same information and amount of time to respond as were non-MBE subcontractors.

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

Offeror Name

Signature of Affiant

Address

Printed Name, Title

Date

SUBMIT AS A .PDF FILE WITH TO RESPONSE

FORM D – 2 - Minority Business Enterprise Participation Schedule

This document shall be included with the submittal of the TO Proposal. If the Offeror fails to submit this form with the TO Proposal, the TO Procurement Officer shall determine that the TO Proposal is not reasonably susceptible of being selected for award.

TO Prime Contractor (Firm Name, Address, Phone)	Task Order Description
Task Order Agreement Number E00P7200416	
List Information For Each Certified MBE Subcontractor On This Project	
Minority Firm Name	MBE Certification Number
Work To Be Performed/SIC	
Percentage of Total Contract	
Minority Firm Name	MBE Certification Number
Work To Be Performed/SIC	
Percentage of Total Contract	
Minority Firm Name	MBE Certification Number
Work To Be Performed/SIC	
Percentage of Total Contract	

USE ATTACHMENT D-2 CONTINUATION PAGE AS NEEDED

SUMMARY

TOTAL MBE PARTICIPATION:

_____ %

TOTAL WOMAN-OWNED MBE PARTICIPATION:

_____ %

TOTAL AFRICAN AMERICAN-OWNED MBE PARTICIPATION:

_____ %

Document Prepared By: (please print or type)
 Name: _____ Title: _____

FORM D- 2 - Minority Business Enterprise Participation Schedule (Continued)

List Information For Each Certified MBE Subcontractor On This Project	
Minority Firm Name	MBE Certification Number
Work To Be Performed/SIC	
Percentage of Total Contract	
Minority Firm Name	MBE Certification Number
Work To Be Performed/SIC	
Percentage of Total Contract	
Minority Firm Name	MBE Certification Number
Work To Be Performed/SIC	
Percentage of Total Contract	
Minority Firm Name	MBE Certification Number
Work To Be Performed/SIC	
Percentage of Total Contract	
Minority Firm Name	MBE Certification Number
Work To Be Performed/SIC	
Percentage of Total Contract	
Minority Firm Name	MBE Certification Number
Work To Be Performed/SIC	
Percentage of Total Contract	

SUBMIT AS A PDF FILE WITH TO RESPONSE

FORM D – 3 - Outreach Efforts Compliance Statement

In conjunction with the bid or offer submitted in response to TORFP # E00P7200416, I state the following:

- 1 Offeror identified opportunities to subcontract in these specific work categories:

- 2 Attached to this form are copies of written solicitations (with bidding instructions) used to solicit certified MBEs for these subcontract opportunities.

- 3 Offeror made the following attempts to contact personally the solicited MBEs:

- 4
 - Offeror assisted MBEs to fulfill or to seek waiver of bonding requirements. (Describe efforts)

 - This project does not involve bonding requirements.

- 5
 - Offeror did/did not attend the pre-proposal conference

 - No pre-proposal conference was held.

_____	By:	_____
Offeror Name		Name
_____		_____
Address		Title
_____		_____
		Date

SUBMIT WITHIN 10 WORKING DAYS OF RECEIVING NOTICE OF THE POTENTIAL REWARD

FORM D – 4 - Subcontractor Project Participation Statement

Submit one form for each Certified MBE listed in the MBE Participation Schedule

Provided that _____ is awarded the TO Agreement in
(Prime TO Contractor Name)
conjunction with TORFP No. E00P7200416, it and _____,
(Subcontractor Name)

MDOT Certification No. _____, intend to enter into a contract by which the subcontractor shall:

(Describe work to be performed by MBE):

-

-

-

-

- No bonds are required of Subcontractor
- The following amount and type of bonds are required of Subcontractor:

By:

By:

Prime Contractor Signature

Subcontractor Signature

Name

Name

Title

Title

Date

Date

SUBMIT WITHIN 10 WORKING DAYS OF RECEIVING NOTICE OF THE POTENTIAL AWARD

FORM D – 5 - Minority Business Enterprise Participation TO Contractor Paid/Unpaid Invoice Report

Report #: _____	CATS TORFP # E00P7200416
Reporting Period (Month/Year): _____	Contracting Unit _____
Report is due by the 15th of the following month.	Contract Amount _____
	MBE Sub Contract Amt _____
	Contract Begin Date _____
	Contract End Date _____
	Services Provided _____

Prime TO Contractor:		Contact Person:	
Address:			
City:		State:	ZIP:
Phone:	FAX:		
Subcontractor Name:		Contact Person:	
Phone:	FAX:		
Subcontractor Services Provided:			
List all unpaid invoices over 30 days old received from the MBE subcontractor named above:			
1.			
2.			
3.			
Total Dollars Unpaid: \$ _____			

**If more than one MBE subcontractor is used for this contract, please use separate forms.

Return one copy of this form to the following address:

TO Manager Andrea Martin Office Phone Number: 410-260-6093 Office FAX Number: 410-974-8415	TO Procurement Officer John T. Salmon Office Phone Number: 410-260-7634 Office FAX Number: 410-974-2762
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Signature: _____ Date: _____

FORM D – 6 - Minority Business Enterprise Participation Subcontractor Paid/Unpaid Invoice Report

Report #: _____ Reporting Period (Month/Year): ___/_____ Report Due By the 15th of the following Month.	CATS TORFP # E00P7200416 Contracting Unit _____ Contract Amount _____ MBE Sub Contract Amt _____ Contract Begin Date _____ Contract End Date _____ Services Provided _____	
MBE Subcontractor Name:		
MDOT Certification #:		
Contact Person:		
Address:		
City:	State:	ZIP:
Phone:	FAX:	
Subcontractor Services Provided:		
List all payments received from Prime TO Contractor during reporting period indicated above. 1. 2. 3. Total Dollars Paid: \$ _____	List dates and amounts of any unpaid invoices over 30 days old. 1. 2. 3. Total Dollars Unpaid: \$ _____	
Prime TO Contractor:		Contact Person:

Return one copy of this form to the following address:

TO Manager Andrea Martin Office Phone Number: 410-260-6093 Office FAX Number: 410-974-8415	TO Procurement Officer John T. Salmon Office Phone Number: 410-260-7634 Office FAX Number: 410-974-2762
---	--

Signature: _____ Date: _____

ATTACHMENT 10 - CLIENT REFERENCE INFORMATION

CATS TORFP # E00P7200416

COMPANY NAME: _____

CLIENT CONTACT NAME: _____

CLIENT PHONE: _____

CLIENT EMAIL: _____

COMPANY NAME: _____

CLIENT CONTACT NAME: _____

CLIENT PHONE: _____

CLIENT EMAIL: _____

COMPANY NAME: _____

CLIENT CONTACT NAME: _____

CLIENT PHONE: _____

CLIENT EMAIL: _____