

## **Request for Proposals**

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**INDEPENDENT ASSESSMENT SERVICES (IAS)  
PROJECT NO. 060B4400002**

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**DEPARTMENT OF INFORMATION TECHNOLOGY**

**Issue Date: October 29, 2013**

**Minority Business Enterprises are encouraged to respond to this Solicitation**

**STATE OF MARYLAND**  
**NOTICE TO OFFERORS/CONTRACTORS**

In order to help us improve the quality of State proposals solicitations, and to make our procurement process more responsive and business friendly, we ask that you take a few minutes and provide comments and suggestions regarding the enclosed solicitation. Please return your comments with your proposals. If you have chosen not to bid on this Contract, please email this completed form to: Michael.Meinl@maryland.gov.

**Title: INDEPENDENT ASSESSMENT SERVICES**

**Project No: 060B4400002**

1. If you have responded with a "no bid", please indicate the reason(s) below:

- Other commitments preclude our participation at this time.
- The subject of the solicitation is not something we ordinarily provide.
- We are inexperienced in the work/commodities required.
- Specifications are unclear, too restrictive, etc. (Explain in REMARKS section.)
- The scope of work is beyond our present capacity.
- Doing business with Maryland Government is simply too complicated. (Explain in REMARKS section.)
- We cannot be competitive. (Explain in REMARKS section.)
- Time allotted for completion of the bid/proposals is insufficient.
- Start-up time is insufficient.
- Insurance requirements are restrictive. (Explain in REMARKS section.)
- Proposal 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 proposal, but wish to offer suggestions or express concerns, please use the Remarks section below. (Use reverse or attach additional pages as needed.)

REMARKS:

\_\_\_\_\_

Bidder Name: \_\_\_\_\_ Date: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Phone (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

Address: \_\_\_\_\_

## KEY INFORMATION SUMMARY SHEET

<b>RFP Title:</b>	<b>Independent Assessment Services (IAS)</b>
<b>RFP Number:</b>	060B4400002
<b>RFP Issue Date:</b>	October 29, 2013
<b>Closing Date and Time:</b>	November 19, 2013 2:00 P.M., Local Time
<b>RFP Issuing Agency:</b>	Department of Information Technology (DoIT) IT Procurement Office
<b>Send Questions (e-mail only) to:</b>	<a href="mailto:Michael.Meinl@Maryland.Gov">Michael.Meinl@Maryland.Gov</a>
<b>Questions Due Date:</b>	November 11, 2013, 5:00 PM Local Time
<b>Procurement Officer:</b>	Michael Meinl <a href="mailto:Michael.Meinl@maryland.gov">Michael.Meinl@maryland.gov</a> Office Phone Number: (410) 260-7179 Office Fax Number: (410) 974-5615
<b>Proposals are to be sent to:</b>	Department of Information Technology 45 Calvert Street, Room 442 Annapolis, MD 21401 Attention: Michael Meinl
<b>Contract Manager:</b>	Larry Jasmann PMP Larry.Jasmann@maryland.gov Office Phone Number: (410) 260-7276 Office Fax Number: (410) 974-5615
<b>Contract Duration:</b>	5 years with two (2) one-year extensions
<b>MBE Goal:</b>	15% with no sub-goals
<b>VSBE Sub Goal</b>	0%
<b>Pre-Proposal Conference:</b>	Department of Information Technology 45 Calvert Street, Room 164 A&B Annapolis, MD 21401 November 6, 2013, 10:30 AM Local Time See Attachment G for directions to the pre-proposal conference

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## SECTION 1 - GENERAL INFORMATION

### 1.1 SUMMARY STATEMENT

- 1.1.1 DoIT is issuing this Request for Proposals (RFP) to procure IAS services for the State of Maryland. The Master Contract resulting from this RFP will provide DoIT and State agencies with the flexibility of obtaining independent assessment and support resources quickly and efficiently by issuing Task Order Requests for Proposals (TORFP) for specific services including snapshot IV&Vs, lifecycle IV&Vs, independent risk assessments, and other assessments.
- 1.1.2 The scope of this solicitation encompasses providing IAS services to the State.
- 1.1.3 DoIT intends to award a Master Contract to not more than six (6) Offerors determined by the State to be qualified. The Offerors shall have one or more documented IAS methodologies for providing IAS services to the State.

Requesting Agencies, including DoIT, intend to issue specific TORFPs, as needed, throughout the term of the IAS Master Contract. All eligible Master Contractors will be invited to respond. Based on the evaluation of responses, as specified in the TORFP, a single or multiple Master Contractor(s) will be selected for award. A specific TO Agreement will then be entered into between the State and the selected Master Contractor(s), which will bind the Master Contractor(s) to the contents of its proposal, including its price. A TORFP, TO Agreement, or Proposal may not in any way conflict with or supersede the Master Contract.

As noted, it is the State's intention to obtain IAS services as specified in this RFP in an indefinite quantity; however, these contracts will not be construed to require the State to purchase exclusively from any Master Contractor. The State reserves the right to procure IAS services from other sources when it is in the best interest of the State to do so and without notice to any Master Contractor.

- 1.1.4 **Master Contractors performing IAS services via awarded TO Agreement under this contract may be rendered ineligible for performing other work on those projects for which they have performed IAS services.** For example, if Master Contractor ABC provides IAS services on the Maryland State Department of Education's (MSDE) Training project, then Master Contractor ABC may be prohibited from being awarded any other work solicited by MSDE on the Training project.

### 1.2 BACKGROUND

DoIT currently procures IAS services under the CATS+ Master Contracts. Although the CATS+ Master Contracts may still be used to solicit independent assessment services by any agency in the State, DoIT and other agencies require the ability to quickly acquire IAS services

with varied durations. Therefore, DoIT is establishing a Master Contract dedicated to IAS services to allow for a variety of services.

### 1.3 ABBREVIATIONS AND DEFINITIONS

For purposes of this RFP, the following abbreviations or terms have the meanings indicated below:

- A. **Agency** – A unit of the Executive Branch of Maryland State government.
- B. **COMAR** – Code of Maryland Regulations, available on-line at [www.dsd.state.md.us](http://www.dsd.state.md.us).
- C. **Commission Only** – Type of payment whereby the exclusive payment to the TO Contractor will be a percentage of monies actually received by the State as a result of the TO Contractor’s audit findings. Note: Commission rate may not exceed 35% of recoveries. This percentage will not be paid for any amount of future cost avoidance or increased revenue that results from a TO Contractor’s finding under any audit.
- D. **COTS** – Commercial-Off-the-Shelf Software.
- E. **Custom Software** – Software, including source code, developed in whole or in part, to meet the project requirements for a TO Agreement.
- F. **Data** – A collection of organized information, usually the result of experience, observation or experiment, other information within a computer system, or a set of premises. This may consist of numbers, words or images, particularly as measurements or observations of a set of variables.
- G. **DoIT** - Department of Information Technology.
- H. **Fixed Price** – Type of payment whereby the exclusive payment to the Master Contractor for a product delivered or performance of services is at a firm price or a price that is subject to contractually specified adjustments.
- I. **Fixed Hourly Labor Rates** - Fully loaded maximum hourly rates established by the Master Contractor to perform a TO Agreement. Master Contractors may propose lower rates in response to TORFPs.
- J. **Fully Loaded** – The inclusion in labor category billing rates of all profit, direct and indirect costs associated with performing a TO Agreement. The indirect costs shall include all costs that would normally be considered general and administrative costs and/or routine travel costs, or which in any way are allocated by the Master Contractor against direct labor hours as a means of calculating profit or recouping costs which cannot be directly attributable to a TO Agreement. Non-routine travel costs will be identified in a TORFP, when appropriate, and in accordance with Section 2.15 of this RFP.
- K. **Independent Assessment Services (IAS)** – Services that a Requesting Agency may procure to independently assess a project, product or service as further described in Section 2.
- L. **Independent Verification and Validation (IV&V)** - procedures that are performed by a third, unbiased party to determine whether or not a product, service, or system meets the documented requirements and specifications and that it fulfills its intended purpose.
- M. **Lifecycle IV&V** - IV&V support that encompasses the entire length of a project.
- N. **Local Time** - The Eastern Time Zone.
- O. **Master Contract** - The contract that will be awarded as a result of this RFP.
- P. **Master Contractor (MC)** - An Offeror who is awarded a Master Contract under this RFP.

- Q. **MBE** – A Minority Business Enterprise certified by the Maryland Department of Transportation (MDOT) under COMAR 21.11.03.
- R. **Offeror** – An entity that submits a proposal in response to this RFP.
- S. **Procurement Officer** – The State representative, as identified in Section 1.6, responsible for this RFP, for the determination of Master Contract scope issues, and the only State representative who can authorize changes to the Master Contract.
- T. **Project Management Book of Knowledge (PMBOK)** - A document created and distributed by the Project Management Institute which provides an industry recognized set of best practice standards for project management.
- U. **Project Management Plan (PMP)** - A document produced by an Offeror, Master Contractor or TO Contractor that provides a PMBOK compliant plan for the execution of a Task Order or project.
- V. **Request for Proposals (RFP)** - This RFP for DoIT, Project Number 060B4400002, dated October 29, 2013, including any amendments.
- W. **Requesting Agency** - An Agency issuing a TORFP under this Master Contract.
- X. **Revenue Neutral** - Procurement of services without charge to the State, regardless of the actual costs incurred, since costs are paid by one or more third parties.
- Y. **Small Business Reserve (SBR)** - A program in accordance with Title 14, Subtitle 5 of the State Finance and Procurement Article of the Annotated Code of Maryland, as amended by Chapter 75, Laws of Maryland 2004, that reserves 10% of the procurement dollars spent by 22 designated agencies for small businesses registered by the Department of General Services (DGS).
- Z. **Software Source Code Documentation** - All design tools, documents and diagrams used in the development of the source code including, but not limited to, data flow diagrams, entity relationship diagrams, work flow diagrams, window layouts, report layouts, process flows, interface designs, logical and physical database design diagrams, technical and user manuals, data dictionaries, and a copy of the development software used to write and compile the source code.
- AA. **Snapshot IV&V** - IV&V support that assesses the project at a single point in time.
- BB. **State** – State of Maryland.
- CC. **Task Order Agreement (TO Agreement)** - A signed agreement between an Agency and the Master Contractor selected for award via a TORFP. A TO Agreement will deal only with the specific TORFP performance aspects. All general terms and conditions contained in the Master Contract shall apply to all TO Agreements.
- DD. **Task Order Manager (TO Manager)** - The State Representative who manages a TO Agreement and directs the activities of the TO Contractor that is working under the terms of the TO Contract.
- EE. **Task Order Contractor (TO Contractor)** - A Master Contractor awarded a TO Agreement.
- FF. **Task Order Contractor Manager (TO Contractor Manager)** - The Contractor's representative identified in a TORFP or a TO Agreement, who will supervise the personnel rendering services for that respective TO Agreement.
- GG. **Task Order Procurement Officer (TO Procurement Officer)** - The TO Procurement Officer has the sole responsibility for the management of the TORFP process, for the resolution of TO Agreement scope issues, and for authorizing any changes to each TO Agreement.



- HH. **Task Order Proposal (TO Proposal)** - The technical and financial response by a Master Contractor to a TORFP.
- II. **Task Order Request for Proposal (TORFP)** - A solicitation document that describes specifics regarding the performance of IAS consulting and technical services as required by an Agency. A TORFP is limited to only labor categories defined in this RFP.
- JJ. **Transformative Enhancement, Assistance, and Mentoring (TEAM) Activities** - TEAM work or activities may be performed by Master Contractor or Oversight Project Manager (OPM) to mentor, monitor, and provides enhancement or assistance services to the Agency to enhance the performance of the project and increase the likelihood of success.
- KK. **Time and Material (T&M)** - Type of payment to the Master Contractor based on direct labor hours billed at specific hourly rates, plus the actual cost of any materials provided. The labor category hourly rates may not exceed the hourly rates specified in the Master Contract. The Master Contractor shall be required to provide time records and/or other documentation documenting that all direct hours billed have actually been expended by its principals or employees, or those of subcontractors, totally and productively in the performance of the specific TO Agreement. In addition, the Master Contractor shall also provide documentation of the actual cost of materials or other activities directly used in the performance of a TO Agreement. The fixed hourly labor category rates, plus the actual cost of materials, and non-routine travel shall be the only payment made for this type of TO Agreement.

**1.4 MASTER CONTRACT TYPE**

The Master Contract shall be an Indefinite Quantity Contract as defined in COMAR 21.06.03.06. Fixed Price (FP) and Time and Material (T&M) TORFPs may be issued under the Master Contract, as appropriate to the type of services being requested. In addition, Business Beneficial, Revenue Neutral or Commission-Only concepts may be applied.

**1.5 MASTER CONTRACT DURATION**

The term of this Contract shall be for a period of five (5) years, beginning on or about February 1, 2014 and terminating on January 31, 2018 with two (2) one-year extension periods.

**1.6 PROCUREMENT OFFICER**

The sole point of contact in the State for purposes of this RFP prior to the award of any Master Contract is the Procurement Officer as identified in the Key Information Summary Sheet. DoIT may change the Procurement Officer at any time by written notice to the Master Contractors.

**1.7 CONTRACT MANAGER (CM)**

The State CM monitors the daily activities of the Master Contract and provides technical guidance to the Master Contractors. The State CM for the Master Contract is identified in the Key Information Summary Sheet. DoIT may change the State CM at any time by written notice to the Master Contractors.

**1.8 PRE-PROPOSAL CONFERENCE**

A pre-proposal conference will be held at the time, date and location indicated on the Key

Information Summary Sheet. Attendance at the pre-proposal conference is not mandatory, but all interested Offerors are encouraged to attend in order to facilitate better preparation of their proposals.

Seating at pre-proposal conference will be limited to two (2) attendees per company. Attendees should bring a copy of the RFP and a business card to help facilitate the sign-in process.

The pre-proposal conference will be summarized in writing. As promptly as is feasible subsequent to the pre-proposal conference, the attendance record and pre-proposal summary will be distributed, free of charge, to all prospective Offerors via eMarylandMarketplace and the DoIT website. In order to assure adequate seating and other accommodations at the pre-proposal conference please email the Procurement Officer indicating your planned attendance no later than three (3) business days prior to the pre-proposal conference. In addition, if there is a need for sign language interpretation and/or other special accommodations due to a disability, please contact the Procurement Officer no later than five (5) business days prior to the pre-proposal conference. The Requesting Agency will make reasonable efforts to provide such special accommodation.

**Directions to the Pre-Proposal Conference can be found in Attachment G.**

## **1.9 USE OF EMARYLAND MARKETPLACE**

eMaryland Marketplace (eMM) is an electronic commerce system administered by the Department of General Services (DGS). In addition to using the DoIT web site ([www.DoIT.maryland.gov](http://www.DoIT.maryland.gov)) and other means for transmitting the RFP and associated materials, the solicitation and summary of the pre-proposal conference, Offeror questions and the Procurement Officer's responses, addenda, and other solicitation related information will be provided via eMM.

In order to receive a Contract award, an Offeror shall be registered on eMM. Registration is free. Vendors may register at: <https://emaryland.buyspeed.com>. Click on "Registration" to begin the process and follow the prompts.

## **1.10 QUESTIONS**

Written questions, from prospective Offerors, will be accepted only by the Procurement Officer. Questions may be submitted by email only to the Procurement Officer. Questions shall be received no later than the date and time specified on the Key Information Summary Sheet.

## **1.11 PROPOSALS DUE (CLOSING) DATE**

The Proposal Due Date is indicated in the Key Information Summary Sheet.

Requests for extension of this date or time will not be granted. Offerors mailing proposals should allow sufficient mail delivery time to ensure timely receipt by the Procurement Officer. Except as provided in COMAR 21.05.03.02, proposals received by the Procurement Officer after the due date and time will not be considered.

**Proposals shall not be submitted by e-mail or facsimile.**

### **1.12 DURATION OF OFFER**

Proposals submitted in response to this RFP are irrevocable for 180 days following the closing date of proposals, or of Best and Final Offers (BAFO), if requested. This period may be extended at the Procurement Officer's request only with the Offeror's written agreement.

### **1.13 REVISIONS TO THE RFP**

If it becomes necessary to revise this RFP before the due date for proposals, amendments to the RFP will be posted on the DoIT Procurement web page and through eMaryland Marketplace. Amendments made after the due date for proposals will be sent only to those Offerors who submitted a timely proposal.

Acknowledgment of the receipt of all amendments to this RFP issued before the proposal due date shall accompany the Offeror's proposal in the Transmittal Letter accompanying the Technical Proposal submittal. Acknowledgement of the receipt of amendments to the RFP issued after the proposal due date shall be in the manner specified in the amendment notice. Failure to acknowledge receipt of amendments does not relieve the Offeror from complying with all terms of any such amendment.

### **1.14 CANCELLATIONS; DISCUSSIONS**

The State reserves the right to cancel this RFP, accept or reject any and all proposals, in whole or in part, received in response to this RFP, to waive or permit cure of minor irregularities, and to conduct discussions with all qualified or potentially qualified Offerors in any manner necessary to serve the best interests of the State. The State also reserves the right, in its sole discretion, to award a Master Contract based upon the written proposals received without prior discussions or negotiations.

### **1.15 ORAL PRESENTATION**

Offerors will be required to make oral presentations to State representatives. Significant representations made by an Offeror during the oral presentation shall become part of the Offeror's proposal and are binding if the Contract is awarded. The Procurement Officer will notify Offerors of the exact time and place of oral presentations; however Offerors shall be prepared to participate in an oral presentation as soon as five (5) business days following the proposal due date.

### **1.16 INCURRED EXPENSES**

The State will not be responsible for any costs incurred by an Offeror in preparing and submitting a proposal, in making an oral presentation, in providing a demonstration, or in performing any other activities relative to this solicitation.

### **1.17 ECONOMY OF PREPARATION**

Proposals should be prepared simply and economically, providing a straightforward, concise description of the Offeror's proposal to meet the requirements of this RFP and should not include marketing material.

### **1.18 PROTESTS/DISPUTES**

Any protest or dispute related respectively to this solicitation or the resulting Contract shall be subject to the provisions of COMAR 21.10 (Administrative and Civil Remedies).

### **1.19 MULTIPLE OR ALTERNATIVE PROPOSALS**

Neither multiple nor alternate proposals will be accepted.

### **1.20 ACCESS TO PUBLIC INFORMATION ACT NOTICE**

An Offeror shall give specific attention to the clear 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, Part III of the State Government Article of the Annotated Code of Maryland.

Offerors are advised that, upon request for this information from a third party, the Procurement Officer is required to make an independent determination whether the information can be disclosed (see COMAR 21.05.08.01).

### **1.21 OFFEROR RESPONSIBILITIES**

Any selected Offeror shall be responsible for all products and services required by this RFP. Additional information regarding MBE subcontractors is provided under Section 1.25. If an Offeror that seeks to perform or provide the services required by this RFP is a subsidiary of another entity, all information submitted by the Offeror, such as, but not limited to, references, shall pertain exclusively to the Offeror, unless the parent organization will guarantee the performance of the subsidiary. If applicable, the Offeror's proposal shall contain an explicit statement that the parent organization will guarantee the performance of the subsidiary.

### **1.22 MANDATORY CONTRACTUAL TERMS**

By submitting an offer in response to this RFP, an Offeror, if selected for award, shall be deemed to have accepted the terms of this RFP and the Master Contract, attached as Attachment A. Any exceptions to this RFP or the Master Contract shall be clearly identified in the Executive Summary of the Technical Proposal. A proposal that takes exception to these terms may be rejected.

### **1.23 PROPOSAL AFFIDAVIT**

A proposal submitted by an Offeror shall be accompanied by a completed Bid/Proposal Affidavit. A copy of this Affidavit is included as Attachment B of this RFP.

### **1.24 CONTRACT AFFIDAVIT**

All Offerors are advised that if a Master Contract is awarded as a result of this solicitation, the successful Offeror shall be required to complete a Master Contract Affidavit. A copy of this Affidavit is included for informational purposes as Attachment C of this RFP. This Affidavit shall be provided within five (5) business days of notification of proposed Master Contract award.

## 1.25 MINORITY BUSINESS ENTERPRISES

The State shall assess the potential for an MBE subcontractor participation goal for each TORFP issued (including any TORFP designated as a Small Business Reserve) and shall set a goal, if appropriate.

Each Offeror shall **complete, sign and submit, without edits, Attachment D-1A** Master Contractor Acknowledgement of Task Order MBE Requirements at the time it submits its technical response to the RFP. **Failure to do so will result in the State's rejection of the Offeror's Proposal to the RFP.**

Master Contractors responding to a TORFP containing an MBE goal **shall complete, sign, without edits, and submit all required MBE documentation - TO Attachments D-1** (Certified MBE Utilization and Fair Solicitation Affidavit) and **D-2** (MBE Participation Schedule) at the time of TO Proposal submission. **Failure to do so will result in the State's rejection of the Master Contractor's proposal to the TORFP.**

Each Master Contractor, once awarded a TO Agreement, will be responsible for submitting the following forms to provide the State with ongoing monitoring of MBE Participation:

D-3 (Outreach Efforts Compliance Statement)

D-4 (Subcontractor Project Participation Statement)

D-5 (MBE Participation Prime Contract Paid/Unpaid MBE Invoice Report)

D-6 (MBE Subcontractor/Master Contractor Unpaid MBE Invoice Report)

The most current directory of certified MBEs is <http://mbe.mdot.state.md.us/directory/> or through MDOT, Office of Minority Business Enterprise, 7201 Corporate Center Drive, Hanover, MD 21076, phone number 410-865-1269.

### 1.25.1 MBE COMPLIANCE AND LIQUIDATED DAMAGES

It is critical to the success of the State's MBE Program that its contractors make good faith efforts to comply with the Program and contract provisions. To that end, COMAR 21.11.03.10 requires all contracts containing certified MBE participation goals to also contain a liquidated damages provision in the event the contractor fails to comply in good faith with the provisions of the State MBE laws or the pertinent contract terms.

By submitting a response to this solicitation, the Master Contractor agrees to make good faith efforts to comply with the MBE program, and agrees that it shall be subject to the Liquidated Damages provision set forth at §34 of the Master Contract (Attachment A).

## 1.26 SMALL BUSINESS RESERVE (SBR)

The State reserves the right to designate any qualifying TORFP issued pursuant to this RFP as an SBR TORFP. The resulting TO Agreement may only be awarded to a Master Contractor that is a certified small business, that meets the statutory qualifications of a Small Business as defined in §14-501(c), State Finance and Procurement (SFP) Article, Annotated Code of

Maryland, and is registered with the DGS SBR Program. The State shall assess the potential for an MBE subcontractor participation goal, if applicable, for each SBR TORFP.

Throughout the term of the Master Contract, Master Contractors qualifying or disqualifying under SBR guidelines shall notify the TO Manager of change in status. Should a Master Contractor become SBR certified after award of a Master Contract, the Master Contractor shall notify the TO Manager and provide the TO Manager with its DGS-assigned SBR Qualification number.

Information regarding the SBR Program and Small Business standards can be obtained from the DGS website at [www.smallbusinessreserve.maryland.gov](http://www.smallbusinessreserve.maryland.gov).

### **1.27 LIVING WAGE REQUIREMENT**

A solicitation for services under a State contract valued at \$100,000 or more may be subject to Title 18, State Finance and Procurement Article, Annotated Code of Maryland. If the Offeror fails to complete and submit the required Living Wage documentation, the State may determine an Offeror to be not responsible. Attachment I Living Wage Affidavit of Agreement has been included for your reference.

Contractors and Subcontractors subject to the Living Wage Law shall pay each covered employee at least \$12.49 per hour, if State contract services valued at 50% or more of the total value of the contract is performed in the Tier 1 Area. If State contract services valued at 50% or more of the total contract value is performed in the Tier 2 Area, an Offeror shall pay each covered employee at least \$9.39 per hour. The specific Living Wage rate is determined by whether a majority of services take place in a Tier 1 Area or Tier 2 Area of the State. The Tier 1 Area includes Montgomery, Prince George's, Howard, Anne Arundel, and Baltimore Counties, and Baltimore City. The Tier 2 Area includes any county in the State not included in the Tier 1 Area. If the employees who perform the services are not located in the State, the head of the unit responsible for a State contract pursuant to §18-102 (d) shall assign the tier based upon where the recipients of the services are located.

### **1.28 ARREARAGES**

By submitting a response to this solicitation, each Offeror represents that it is not in arrears in the payment of any obligations due and owing the State, including the payment of taxes and employee benefits, and that it shall not become so in arrears during the term of the Master Contract if selected for Master Contract award.

### **1.29 PROCUREMENT METHOD**

Master Contracts will be awarded in accordance with the competitive sealed proposals process, under COMAR 21.05.03.

### **1.30 VERIFICATION OF REGISTRATION AND TAX PAYMENT**

Before a corporation can do business in the State, it shall be registered with the State Department of Assessments and Taxation (SDAT), State Office Building, Room 803, 301 West Preston Street, Baltimore, Maryland 21201. Any potential Offeror should complete registration prior to the due date for receipt of proposals. An Offeror's failure to complete registration with SDAT may disqualify an otherwise successful Offeror from final consideration and recommendation for Contract award.

### **1.31 FALSE STATEMENTS**

Offerors are advised that Section 11-205.1 of the State Finance and Procurement Article of the Annotated Code of Maryland provides as follows:

- a. In connection with a procurement contract a person may not willfully:
- b. Falsify, conceal, or suppress a material fact by any scheme or device;
- c. Make a false or fraudulent statement or representation of a material fact; or
- d. Use a false writing or document that contains a false or fraudulent statement or entry of a material fact.
- e. A person may not aid or conspire with another person to commit an act under subsection (a) of this section.
- f. A person who violates any provision of this section is guilty of a felony and on conviction is subject to a fine not exceeding \$20,000 or imprisonment not exceeding five (5) years or both.

### **1.32 NON-VISUAL ACCESS**

Where applicable, the following will apply to TORFPs issued under this contract:

By submitting a TO Proposal, the Master Contractor warrants that the information technology offered under the TO Proposal (1) provides equivalent access for effective use by both visual and non-visual means; (2) will present information, including prompts used for interactive communications, in formats intended for both visual and non-visual use; (3) if intended for use in a network, can be integrated into networks for obtaining, retrieving, and disseminating information used by individuals who are not blind or visually impaired; and (4) is available, whenever possible, without modification for compatibility with software and hardware for non-visual access. The Master Contractor further warrants that the cost, if any, of modifying the information technology for compatibility with software and hardware used for non-visual access will not increase the cost of the information technology by more than five percent. For purposes of this Master Contract, the phrase “equivalent access” means the ability to receive, use and manipulate information and operate controls necessary to access and use information technology by non-visual means. Examples of equivalent access include keyboard controls used for input and synthesized speech, Braille, or other audible or tactile means used for output.

The Non-visual Access Clause noted in COMAR 21.05.08.05 and referenced in this solicitation is the basis for the standards that have been incorporated into the Maryland regulations, which can be found at: [www.DoIT.maryland.gov](http://www.DoIT.maryland.gov) – Search: nva

### **1.33 PAYMENTS BY ELECTRONIC FUNDS TRANSFER**

By submitting a response to this solicitation, the Offeror agrees to accept payments by electronic funds transfer unless the State Comptroller’s Office grants an exemption. The selected Offeror shall register using the COT/GAD X-10 Vendor Electronic Funds (EFT) Registration Request Form. Any request for exemption shall be submitted to the State Comptroller’s Office for approval at the address specified on the COT/GAD X-10 form and shall include the business identification information as stated on the form and include the reason for the exemption. The COT/GAD X-10 form can be downloaded and registration instructions found at:

[http://comptroller.marylandtaxes.com/Vendor\\_Services/Accounting\\_Information/Electronic\\_Funds\\_Transfer/](http://comptroller.marylandtaxes.com/Vendor_Services/Accounting_Information/Electronic_Funds_Transfer/)

#### **1.34 CONTRACT EXTENDED TO INCLUDE OTHER NON-STATE GOVERNMENTS OR AGENCIES IN MD**

For the purposes of an information technology or telecommunications procurement, pursuant to Sections 3A-401(b) and 13-110 of the State Finance and Procurement Article of the Annotated Code of Maryland, county, municipal, other State non-executive branch entities, and non-State governments or agencies may purchase from the Contractor goods or services covered by this Contract at the same maximum prices to which the State would be subject under the resulting Contract. All such purchases:

- Shall constitute Contracts between the Contractor and that government or entity;
- For non-State entities, shall not constitute purchases by the State or State agencies under this Contract;
- For non-State entities, shall not be binding or enforceable against the State; and
- May be subject to other terms and conditions agreed to by the Contractor and the purchaser. Contractor bears the risk of determining whether or not a government or agency with which the Contractor is dealing is a State entity.

#### **1.35 CONFLICT OF INTEREST**

Under State Government Article 15-508 of the State ethics laws, a person and their employer who assist or are involved in the drafting of specifications for a procurement are prohibited from submitting a proposal for that procurement, from assisting or representing another person, directly or indirectly, who is submitting a proposal for that procurement, and from participating in the implementation of those specifications, whether as a prime or subcontractor. This section of the State Ethics Law may apply to TORFPs issued to Master Contractors under the IAS procurement.

Master Contractors shall provide IAS services for State agencies, or component programs with those agencies and shall do so impartially and without any conflicts of interest. Master Contractors shall be required to complete a Conflict of Interest Affidavit with each TO Proposal submitted in response to a TORFP. A copy of this Affidavit is included as Attachment F of this RFP. If the Procurement Officer makes a determination before award of a TO Agreement pursuant to a respective TORFP 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 Procurement Officer may reject a TO Proposal under COMAR 21.06.02.03B.

#### **1.36 PROMPT PAY**

This procurement and the contract to be awarded pursuant to this solicitation are subject to the Prompt Payment Policy Directive issued by the Governor's Office of Minority Affairs dated August 1, 2008. The Directive seeks to ensure the prompt payment of all subcontractors on non-construction procurement contracts. The successful Offerors who are awarded Master Contracts under this RFP shall comply with the prompt payment requirements outlined in the Contract, §32 (see Attachment A). Additional information is available on the GOMA website at <http://www.oma.state.md.us/>.



### **1.37 IRANIAN NON-INVESTMENT**

A proposal submitted by an Offeror shall be accompanied by a completed Certification Regarding Investments in Iran. This certification is included as a clause in Attachment B, Bid Proposal Affidavit.

### **1.38 VETERAN OWNED SMALL BUSINESS?**

The State shall assess the potential for a VSBE subcontractor participation goal for each TORFP issued (including any TORFP designated as a Small Business Reserve) and shall set a goal, if appropriate.

Each Offeror shall **complete, sign and submit, without edits, Attachment K-V1A IAS Master Contractor Acknowledgement of Task Order VSBE Requirements** at the time it submits its technical response to the RFP. **Failure to do so will result in the State's rejection of the Offeror's Proposal to the RFP.**

Master Contractors responding to a TORFP/RFR containing a VSBE goal **shall complete, sign, without edits, and submit all required VSBE documentation - TO Attachments K V-1 (Veteran-Owned Small Business Enterprise Utilization Affidavit and VSBE Participation Schedule)** at the time of TO Proposal submission. **Failure to do so will result in the State's rejection of the Master Contractor's proposal to the TORFP.**

Each Master Contractor once awarded a TO Agreement, will be responsible for submitting the following forms to provide the State with ongoing monitoring of VSBE Participation:

- V-2 (VSBE Subcontractor Participation Statement) – due 10 days after notification of award
- V-3 (VSBE Prime Contractor Unpaid Invoice Report)
- V-4 (VSBE Subcontractor Unpaid Invoice Report)

The listing of verified VSBEs may be found at <http://www.vetbiz.gov>.

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## **SECTION 2 - SCOPE OF WORK**

### **2.1 SCOPE AND OBJECTIVE**

- 2.1.1 The scope of this solicitation encompasses providing IAS services to the State. The scope of services contained herein is intended to outline general requirements under this RFP. Specific details of scope, time and budget shall be provided in each individual TORFP.
- 2.1.2 The objective of this solicitation is to streamline the process by which DoIT and other State agencies obtain IAS services to meet instances in which DoIT or the agency:
- Needs a second opinion on a project, product or service.
  - Requires certain information to be redacted from the results to maintain impartiality, such as a double-blind study.
  - Does not have the capability or specialty in specific subject matter areas to perform an assessment.

### **2.2 GENERAL REQUIREMENTS**

Based on the requirements of each individual TORFP, the following applies:

#### 2.2.1 Software and Data

In the event that COTS or custom software or data are required by TORFPs executed under the contract that is executed as a result of this RFP, the following apply:

##### 2.2.1.1 COTS Software

Any COTS software provided by the TO Contractor shall be provided at cost. No additional fees or markups shall be allowed. The TO Contractor shall provide all invoices for material

1. In responding to any TORFP for which a Master Contractor proposes the purchase of any COTS software in its TO Proposal, a Master Contractor shall specifically identify in its TO Proposal the COTS software proposed for use by the State, the justification for the COTS software, the quantity needed and a selling price for which it will provide the COTS software.
2. By responding to this RFP and accepting a Master Contract award, a Master Contractor specifically agrees that for any COTS software that it proposes for use by the State in response to a TORFP, the State will have the right to purchase the proposed COTS software from another source, instead of from the selected Master Contractor.
3. If the State chooses to purchase any COTS software from a source other than the selected Master Contractor, provided the State purchases the same COTS software as proposed by the Master Contractor in its TO Proposal, the Master Contractor shall agree to accept the COTS software provided by the State and shall integrate it with its service delivery the same as if the Master Contractor had provided the COTS

software itself. Unless TO Contractor provides conclusive evidence of faulty installation or the installation of substandard or defective COTS software by another party, including the State, the TO Contractor may not use the fact that it did not directly provide the COTS software as an excuse for non-performance of any deliverable under a TO Agreement.

4. A TORFP shall not be issued under this Master Contract, if COTS software costs are anticipated to exceed 49% of the value of the resulting TO Agreement.

#### 2.2.1.2 Custom Software

1. When developed under a TO Agreement, the State shall solely own any custom software, including, but not limited to, application modules developed to integrate with COTS software, source code, maintenance updates, documentation, or configuration files.
2. Upon a Master Contractor's voluntary or involuntary filing of bankruptcy or any other insolvency proceeding, Master Contractor's dissolution, Master Contractor's merger with or acquisition by another company or contractor, discontinuance of support of any software or system, the Master Contractor shall convey to the State all rights, title, and interests in all custom software, licenses, software source codes, and all associated Software Source Code Documentation that comprises any solutions proposed as a part of the Master Contract or TO Agreement. These rights include, but are not limited to, the rights to use, and cause others to use on behalf of the State, said software, software documentation, licenses, software source code, and Software Source Code Documentation.

#### 2.2.1.3 Data

1. Data, databases and derived data products created, collected, manipulated, or directly purchased as part of a TORFP shall become the property of the State. The purchasing Agency is considered the custodian of the data and shall determine the use, access, distribution and other conditions based on appropriate State statutes and regulations.
2. Licensed and/or copyrighted data shall be governed by the terms and conditions identified in the TO Agreement.

#### 2.1.1 Required Project Policies, Guidelines and Methodologies

1. The Master Contractor shall stay informed and comply with all applicable federal, State and local laws, regulations, ordinances, policies, standards and guidelines affecting information technology projects applicable to its activities and obligations under this Contract, as those laws, policies, standards and guidelines may be amended from time to time, and it shall obtain and maintain, at its expense, all licenses, permits, insurance, and governmental approvals, if any, necessary to the performance of its obligations under this Contract. It is the responsibility of the Master Contractor to ensure adherence and to remain abreast of new or revised laws, regulations, policies, standards and guidelines affecting project execution. The following policies, guidelines and methodologies can be found at

<http://doit.maryland.gov/policies/Pages/ContractPolicies.aspx> under “Policies and Guidance.” These may include, but are not limited to:

- a. The State’s System Development Life Cycle (SDLC) methodology;
  - b. The State Information Technology Security Policy and Standards;
  - c. The State Information Technology Project Oversight; and
  - d. The State of Maryland Enterprise Architecture.
2. The Master Contractor shall follow the project management methodologies that are consistent with the Project Management Institutes (PMI) Project Management Body of Knowledge (PMBOK) Guide. Master Contractor’s staff and subcontractors are to follow a consistent methodology for all TORFP activities.
  3. The Master Contractor shall apply a structured methodology to identify, evaluate, and select hardware, software, and services (e.g., telecommunications services, Internet access services, software maintenance) to meet specific requirements and when warranted, adjusting the methodology, including prototypes and pilots, to mitigate risk.

## **2.3 INDEPENDENT ASSESSMENT SERVICES**

### 2.3.1 Secondary Competition

After the award of Master Contractors under this IAS Master Contract, a secondary competition document, using a TORFP, will be issued to Master Contractor(s) for performing IAS services to provide maximum flexibility to the State to secure services from Master Contractors, while minimizing the response burden and maximizing ability for Master Contractors to meet immediate requirements of the State. In general, a TORFP will address the broad process/scope of the assessment project. TORFPs may be either Time and Materials or Fixed Price.

### 2.3.2 General Types of Independent Assessments

Two general types of independent assessment services are contemplated under this contract:

1. **IV&V Assessments:** Assessments that review an Agency or projects to determine whether or not a product, service, process or system meets the documented requirements and specifications and that it fulfills its intended purpose. IV&V assessments may be conducted by DoIT or by another Requesting Agency. Section 2.3.3 further describes this requirement.
2. **Other Independent Assessments:** Other assessments are independent assessments that are focused on performing independent research on a wide variety of topics or issues. Section 2.3.4 further describes this requirement.

Requesting Agency, on a case-by-case basis, will determine which requirement is the most appropriate.

The examples of independent assessment services listed in this section are not all inclusive of the services available under this Master Contract.

### 2.3.3 IV&V Assessment Services

#### 2.3.3.1 Snap-Shot IV&V

1. Description – IV&V of projects to assess the health of the project accordance with the objectives listed in Section 2.3.6 at a particular point in time, the approach for each IV&V assessment may include independent research, stakeholder interviews, observation of project processes, and the review and analyses of project files and documentation as they exist at the time of assessment. All IV&Vs require completion of phase one deliverables described in each TORFP, which will establish a baseline assessment of current project health. In snapshot IV&Vs, subsequent optional phases may be requested from the TO Contractor to provide oversight support services required by Requesting Agency.
2. Examples of Potential Services:
  - a) Perform IV&V of Contractor services for implementation of a replacement of a legacy system with a report to Requesting Agency on findings and recommendations on risks; and
  - b) Monitor and report on Agency compliance during the optional phase and provide on-site assistance to support Agency activities.

#### 2.3.3.2 Lifecycle IV&V

1. Description –IV&V of projects to monitor the health of the project on a full-time basis in accordance to the objectives listed in Section 2.3.6 and provide periodic reports to the Requesting Agency as required. The approach for each lifecycle IV&V assessment shall include independent research, stakeholder interviews, monitoring project processes, and quality review and analyses of project deliverables and documentation. Unlike snap-shot IV&Vs which provide an assessment of a project at a particular point in time, lifecycle IV&Vs are continuous throughout the time of the project being assessed.
2. Examples of Potential Services:
  - a) Perform continuous IV&V of Contractor services for implementation of a replacement of a legacy system with periodic reports to Requesting Agency on findings and recommendations on issues and risks; and
  - b) Continuous monitoring and reporting on Agency compliance during the TEAM Phase and providing on-site assistance to support Agency corrective actions on an ongoing basis.

#### 2.3.4 Other Independent Assessment Services

##### 2.3.4.1 Information Systems Auditing and Quality Assurance

1. Description - Quality assurance audits of IT systems to ensure that systems perform to documented specifications in areas such as: data security, customer privacy, data accuracy, business processes, and customer satisfaction. In support of these efforts, auditing expertise to either perform or validate internal quality assurance audits for large- and medium-scale information technology projects in various environments (i.e., mainframe, mini computers, client/server, WAN/LAN).
2. Examples of Potential Services:

- a) Perform or validate quality assurance audits of IT systems during the development process and report to a Requesting Agency on findings and recommend mechanisms to correct the issues identified in the audits;
- b) Develop an action plan that corrects audit findings and report to a Requesting Agency on the results of these corrective actions; and
- c) Perform a Certification and Accreditation (C&A) security assessments.

#### 2.3.4.2 Risk Assessment Analysis

1. Description – Assess the risks associated with costs, benefits, schedule, technical performance, human factors, safety and security. The analysis may include provisions for identifying risk areas, assessing risk factors, recommending appropriate resources to reduce risk factors, identifying and analyzing alternative actions available, identifying the most promising alternatives, and planning for implementation of risk reduction.
2. Examples of Potential Services:
  - a) Assess risks and review technical risk assessments of an IT project, including subsystem designs, architectures, and computer systems in terms of their impact on costs, benefits, schedule and technical performance;
  - b) Perform cost and schedule risk assessments to support various alternatives to meet mission need, recommend alternative courses of action when one or more interdependent segment(s) or phase(s) experience a delay, and recommend opportunities for new technology insertions;
  - c) Provide fraud detection and prevention expertise on services to internal and external customers;
  - d) Perform technical risk assessments at various points in the system life cycle;
  - e) Identify areas of technical risk when translating operational requirements into system level requirements;
  - f) Develop and/or evaluate potential methods of mitigating technical risks;
  - g) Update evaluations in order to determine and forecast operational needs and changes;
  - h) Provide presentations on reporting and operational enhancements;
  - i) Develop operational management reporting tools and programs to prevent or mitigate risks; and
  - j) Provide and/or develop risk management policies, procedures and guidelines.

#### 2.3.4.3 Other Assessments

1. Description – Other independent, third party assessment of Information Technology products, artifacts, capabilities and service.
2. Examples of Potential Services – Provide a review, evaluation and rating of capability and/or performance on topics such as:
  - a) Code of ethics and business practices;
  - b) Reconcile financial status including assets, liabilities, operating capital, cash flow, insurance coverage, annual reports, legal history;
  - c) Rank solutions among peers in the industry;
  - d) Assess personnel qualifications;
  - e) Evaluate reputation in the industry;

- f) Assess customer satisfaction levels in performing projects;
- g) Evaluate strengths and weaknesses in performing projects;
- h) Assess project management methodologies applied to projects and results;
- i) Projects performed on time, on budget and within scope and meeting the business requirements originally intended; and
- j) Perform double-blind technology assessments.

For further examples, see the check list provided in Section 2.3.6.

### 2.3.5 IAS Approach

The approach for each IAS service being conducted by a TO Contractor may vary, and may include independent research, stakeholder interviews, and the review and analyses of business processes, files and documentation. In working with stakeholders, the TO Contractor shall strive to minimize or avoid any adverse impact on the target business process and schedules. For each TORFP, the TO Contractor shall assign a TO Contractor Manager who shall be the TO Contractor's lead resource on the TORFP. The TO Contractor shall provide the deliverables as described in each TORFP.

In executing the TORFP and developing TORFP deliverables, the TO Contractor shall apply applicable and recognized industry best practices and standards including PMI standards. The TO Contractor shall apply applicable industry standards as defined in the TORFP.

### 2.3.6 IAS Objectives

For each IAS, Requesting Agency may select from one or many areas of assessments as part of the objectives for the IAS. These could include:

- A) Project management processes consistent with PMBOK knowledge areas:
  - 1. Project Scope Management
  - 2. Project Time Management
  - 3. Project Cost Management
  - 4. Project Quality Management
  - 5. Project Human Resource Management
  - 6. Project Communications Management
  - 7. Project Risk Management
  - 8. Project Integration Management
  - 9. Project Procurement Management
  - 10. Others as defined by State
- B) Application of the State of Maryland's SDLC methodology;
  - 1. Initiation
  - 2. System Concept Development
  - 3. Planning
  - 4. Requirements Analysis
  - 5. Design
  - 6. Development
  - 7. Integration and Test
  - 8. Implementation
  - 9. Operations & Maintenance

- 10. Disposition
- 11. Others as defined by State
- C) Capability of the Project Manager, or designee, to report accurately on:
  - 1. Project financials including total project costs associated with satisfying all phases of the SDLC
  - 2. Project issues and risks
  - 3. Project timeline including deliverables status
  - 4. Others as defined by State
- D) Project governance, meaning the extent to which the Agency has effectively:
  - 1. Defined roles and expectations among all internal and external stakeholders
  - 2. Implemented an appropriate flow of project information among stakeholders
  - 3. Instituted a process for review and response to project issues including escalation to the executive sponsor
  - 4. Instituted a process for executive approvals (for example, sign-off of SDLC documents) at appropriate project milestones
  - 5. Others as defined by State
- E) Feasibility of the solution:
  - 1. Technical Feasibility
    - i. Software
    - ii. Hardware
    - iii. Architecture
    - iv. Integration Compatibilities
  - 2. Schedule Feasibility
  - 3. Operational Feasibility
  - 4. Economic Feasibility
  - 5. Organizational Maturity Assessment
  - 6. Others as defined by State
- F) Organizational Maturity Assessment
- G) Verification and Validation of Project Artifacts to include:
  - 1. Procurement Documents (e.g., RFP, TORFP)
  - 2. SDLC Deliverables including Requirements, Design, Code, and Test Document
- H) Project and/or Contract Auditability
- I) Other objectives / assessment areas tailored to specific circumstances.

## **2.4 MASTER CONTRACTOR MINIMUM QUALIFICATIONS**

Offerors shall meet all of the following minimum qualifications in order to be considered reasonably susceptible for award. Failure to meet any one of the minimum qualifications shall result in the Offeror's proposal being disqualified.

- 2.4.1 Provide six (6) examples within the past three (3) years of IAS or equivalent quality assurance engagements on IT development projects for commercial or government entities. The scope of the six (6) examples must include one or more of the following areas of work:

- 1. IV&V (snapshot or life cycle)



2. Information Systems Auditing and Quality Assurance
3. Risk Assessment Analysis

2.4.2 At least three (3) of the examples must have evaluated information system development projects with a project value in excess of \$10,000,000.

2.4.3 At least one (1) of the examples must have evaluated an information systems development project with a project value in excess of \$15,000,000.

## **2.5 SECURITY REQUIREMENTS**

Master Contractors shall comply with and adhere to the State IT Security Policy and Standards where applicable to a TORFP. These policies may be revised from time to time and the Master Contractor shall comply with all such revisions. Updated and revised versions of the State IT Policy and Standards are available at: [www.DoIT.maryland.gov](http://www.DoIT.maryland.gov) - search: Security Policy

### 2.5.1 IT Security

The Master Contractor shall not connect any of its own equipment to a State LAN/WAN without prior written approval by the State.

The Master Contractor shall complete any necessary paperwork for security access to sign on at the State's site if access is granted to the State's LAN/WAN, as directed and coordinated with the TO Manager.

### 2.5.2 Physical Security:

Each person who is an employee or agent of the Master Contractor or subcontractor shall display his or her company identification badge at all times while on State premises. Upon request of State personnel, each such employee or agent shall provide additional photo identification.

2.5.3 Security Clearance (May be required by some Agencies and will be identified as such in the TORFP):

2.5.3.1 The Master Contractor shall obtain a Criminal Justice Information System (CJIS) State and Federal criminal background check, including fingerprinting, for each individual performing services under a TO Agreement. This check may be performed by a public or private entity. A successful CJIS State criminal background check shall be completed prior to any Master Contractor employee providing services on-site at any location covered by the TO Agreement. A CJIS Federal background check is necessary for each employee assigned to work on the TO Agreement and shall be completed within four (4) months of TO Agreement award.

2.5.3.2 The Master Contractor shall provide certification to the Requesting Agency that the Master Contractor has completed the required CJIS criminal background checks and that the Master Contractor's employees assigned to this TO

Agreement have successfully passed this check. The State reserves the right to refuse any individual employee to work on State premises, based upon certain specified criminal convictions, as specified by the State.

- 2.5.3.3 The CJIS criminal record check of each employee who will work on State premises shall be reviewed by the Master Contractor for convictions of any of the following crimes described in the Annotated Code of Maryland, Criminal Law Article:
1. §§ 6-101 through 6-104, 6-201 through 6-205, 6-409 (various crimes against property);
  2. any crime within Title 7, Subtitle 1 (various crimes involving theft);
  3. §§ 7-301 through 7-303, 7-313 through 7-317 (various crimes involving telecommunications and electronics);
  4. §§ 8-201 through 8-302, 8-501 through 8-523 (various crimes involving fraud);
  5. §§9-101 through 9-417, 9-601 through 9-604, 9-701 through 9-706.1 (various crimes against public administration); or
  6. A crime of violence as defined in CL § 14-101(a).
- 2.5.3.4 An employee of the Master Contractor who has been convicted of a felony or of a crime involving telecommunications and electronics from the above list of crimes shall not be permitted to work on State premises pursuant to this Master Contract; an employee of the Master Contractor who has been convicted within the past five (5) years of a misdemeanor from the above list of crimes shall not be permitted to work on State premises.
- 2.5.3.5 A Requesting Agency may impose more restrictive conditions regarding the nature of prior criminal convictions that would result in an employee of Master Contractor not being permitted to work on that Agency's premises. Upon receipt of an Agency's more restrictive conditions regarding criminal convictions, the Master Contractor shall provide an updated certification to that Agency regarding the personnel working at or assigned to that Agency's premises.

On-site security requirement(s) (Required by some State agencies and will be identified as such in the TORFP): For all conditions noted below, the Master Contractor's personnel may be barred from entrance or leaving any site until such time that the State conditions and queries are satisfied.

- 2.5.3.6 Any person who is an employee or agent of the Master Contractor or subcontractor and who enters the premises of a facility under the jurisdiction of the Requesting Agency may be searched, fingerprinted (for the purpose of a criminal history background check), photographed and required to wear an identification card issued by the Requesting Agency .
- 2.5.3.7 Further, the Master Contractor, its employees and agents and subcontractors' employees and agents shall not violate Md. Code Ann., Criminal Law Art. Section 9-410 through 9-417 and such other security policies of the Requesting Agency that controls the facility to which access by the Master Contractor will

be necessary. The failure of any of the Master Contractor's or subcontractor's employees or agents to comply with any provision of the Contract that results from award of this solicitation is sufficient grounds for the State to immediately terminate that Contract for default.

- 2.5.3.8 Some State sites, especially those premises of the Department of Public Safety and Correctional Services, require each person entering the premises to document an inventory items (such as tools and equipment) being brought onto the site, and to submit to a physical search of his or her person. Therefore, the Master Contractor's personnel shall always have available an inventory list of tools being brought onto a site and be prepared to present the inventory list to the State staff or an officer upon arrival for review, as well as present the tools or equipment for inspection. Before leaving the site, the Master Contractor's personnel will again present the inventory list and the tools or equipment for inspection. Upon both entering the site and leaving the site, State staff or a correctional or police officer may search Master Contractor personnel.
- 2.5.3.9 At all times at any facility, the Master Contractor's personnel shall ensure cooperation with State site requirements which include being prepared to be escorted at all times, and providing information for badging and wearing the badge in a visual location at all times.

## **2.6 PERSONNEL QUALIFICATIONS**

Master Contractors shall only propose staff available at the time and duration of the TORFP performance period. In response to each TORFP, Master Contractors shall provide personnel that satisfy the personnel qualifications specified within Section 2.7 for each of the labor categories required under the specific solicitation. In the event that labor categories are not identified in a TORFP, Master Contractors shall provide the appropriate labor categories from those specified in Section 2.7.

Specific areas of minimum qualifications and required expertise may be further defined in a TORFP. The Master Contractors shall certify that all candidates meet the required qualifications. At the option of the State, Master Contractor personnel may be approved for performance in multiple skill categories for which they are qualified.

Managers, seniors, and other lead labor categories may serve as a Task Leader on one or more TO Agreement. Task Leaders shall have supervisory or project leader experience. This experience is not in addition to the experience requirements for the skill category.

The TORFP will define specific IAS task requirements. The TO Proposal shall clearly identify applicable experiences related to projects and technologies being used.

**Substitution of Education for Experience.** A Bachelor's Degree or higher may be substituted for the general and specialized experience for those labor categories requiring a High School Diploma. A Master's Degree may be substituted for two years of the general and specialized experience for those labor categories requiring a Bachelor's Degree. Substitution shall be reviewed and approved by the State.

**Substitution of Experience for Education.** Substitution of experience for education may be permitted at the discretion of the State.

Substitution of Professional Certificates for Experience: Professional certification (e.g., Certified Novell Engineer, SQL Certified Database Administrator) may be substituted for up to two (2) years for general and specialized experience. The TO Manager shall approve or disapprove substitutions.

#### 2.6.1 Substitution of Personnel

- 2.6.1.1 Individuals proposed and accepted as personnel for TO Agreements are expected to remain dedicated throughout the TO Agreement commitment. Substitutions will be allowed only when the State specifically agrees to the substitution in writing or due to an emergency circumstance as described in Section 2.6.1.2) of this Section. All proposed substitutes of personnel shall have qualifications at least equal to that of the person initially proposed and evaluated and accepted in the TO Agreement. The burden of illustrating this comparison shall be the Master Contractor's. The resumes of the initially proposed personnel shall become the minimum requirement for qualifications for successor personnel for the duration of the total TO Agreement term. If one or more of the personnel are unavailable for work under a TO Agreement for a continuous period exceeding 15 calendar days, the TO Contractor shall immediately notify the TO Manager and propose to replace personnel with personnel of equal or better qualifications within 15 calendar days of notification to the TO Manager. All substitutions shall be made in accordance with this provision.
- 2.6.1.2 During the performance period for a TO Agreement, no substitutions of personnel will be permitted unless such substitutions are necessitated by an individual's sudden illness, death, or as otherwise approved by the TO Manager. In any of these events, the TO Contractor shall promptly notify the TO Manager and provide the information required by Section 2.6.1.3. All proposed substitutions of personnel for other than emergency situations shall be submitted in writing, at least 15 business days in advance of the proposed substitution, to the TO Manager, with the information required in Section 2.6.1.3. The TO Manager shall agree to the substitution in writing before such substitution shall become effective.
- 2.6.1.3 All requests for substitutions shall provide a detailed explanation of the circumstances necessitating the proposed substitutions, a resume of the proposed substitute (see Section 2.6.1.4), and any other information requested by the TO Manager to make a determination as to the appropriateness of the proposed substitution. All proposed substitutes shall have educational qualifications and work experience equal to or better than the resume initially proposed for personnel; the burden of illustrating this comparison shall be the TO Contractor's.
- 2.6.1.4 Resumes shall be signed by all substituting individuals and their formal supervisor, and the official resume of the previous employee shall be provided for comparison purposes.

## 2.7 LABOR CATEGORIES

The following section describes the labor categories to be provided under the RFP.

### 1. Accountant, Cost (Senior)

**Duties:** Provides cost estimating and financial management support, including all activities, which occur during the life cycle of an information technology application or system. Conducts investment analyses or other complex operational analyses. Provides expertise and support in conducting a full range of investment analyses activities, including market surveys, cost analyses, benefits analyses, risk analyses, economic analyses, requirements definitions, schedule development, and tradeoff studies. Supports architecture efforts including economic analyses of architecture alternatives, architecture issues resolutions, and affordability analyses. Conducts analytical studies involving complex technical analyses, schedule constraints, and system benefits and system cost factors. Identifies cost accounting or financial problems and recommends solutions. Presents plans, analyses, and other advice within functional areas.

**Education:** Bachelor's Degree from an accredited college or university in Economics, Business, Accounting, Finance, or related discipline.

**General Experience:** A minimum of eight (8) years relevant experience as a cost analyst or involved in analysis in business-related subject areas such as accounting, finance or economics.

**Specialized Experience:** At least five (5) years of experience in financial cost accounting with demonstrated success in analyzing information systems.

### 2. Analyst, Computer Software/Integration (Senior)

**Duties:** Must be knowledgeable in implementing computer systems in a phased approach of requirements analysis and conceptual design, site survey, system design review, critical design review, installation, integration, and testing. Must be knowledgeable in performing requirements analysis for a wide range of users in areas such as office automation, and finance and accounting. Must be able to present system designs for user approval at formal reviews. Must be capable of performing configuration management, software integration, interpreting software test results, and recommending solutions for unsatisfactory test results. Must be knowledgeable in life-cycle support, including maintenance, administration, and management. Must be able to provide solutions to identified software problem reports.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline.

**General Experience:** Must have eight (8) years of progressive working experience as a computer specialist or a computer systems analyst.

**Specialized Experience:** At least five (5) years of experience as a Computer Systems Analysts

### 3. Analyst, Computer Systems (Junior)

**Duties:** Develops requirements for information systems from a project's inception to conclusion. Develops required specifications for simple to moderately complex systems.

Assists senior computer systems analyst in preparing input and test data for the proposed system.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline or three (3) years of equivalent experience in a related field.

**General Experience:** Must have three (3) years of computer experience in assignments of a technical nature working under close supervision and direction.

**Specialized Experience:** At least one (1) year of experience in analyzing and programming applications on large-scale or mid-tier computers (or LAN-based) with a minimum of one (1) year of design and programming of moderately complex IT systems.

#### **4. Analyst, Computer Systems (Senior)**

**Duties:** Provides technical and administrative direction for personnel performing software development tasks, including the review of work products for correctness, adherence to the design concept and to user standards and for progress in accordance with schedules. Must be able to coordinate with the Program Manager to ensure problem solution and user satisfaction. Makes recommendations, if needed, for approval of major systems installations. Prepares milestone status reports and deliveries/presentations on the system concept to colleagues, subordinates, and end user representatives. Provides daily supervision and direction to support staff.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline or three (3) years of equivalent experience in a related field.

**General Experience:** Must have eight (8) years of computer experience working independently or under general direction on complex application problems involving all phases of systems analysis.

**Specialized Experience:** At least five (5) years of experience in analysis and design of business applications for complex large-scale or mid-tier computer systems, or LAN-based systems, to include experience in Database Management Systems (DBMS), and use of programming languages. Knowledge of current storage and retrieval methods and demonstrated ability to formulate specifications for computer programmers to use in coding, testing, and debugging of computer programs.

#### **5. Analyst, Financial**

**Duties:** Must be able to clearly define government financial business practices and Electronic Commerce/Electronic Data Interchange (EC/EDI) opportunities, and incorporate the defined processes into an automated solution that includes relational databases and distributed systems for integration into the government financial business system. Identifies potential problems and solutions through analysis identifying recommended solutions. Must be able to work with functional specialists, automation specialists, Master Contractors, vendors, and customers to effectively automate the customer's requirements into an automated application. Acts as a focal point to coordinate all disciplines in the recommended solution. Must be able to communicate with both IT and financial oriented individuals to document the flow, recommend opportunities, impact

recommendations, and serve as the liaison between the financial specialist and automation specialist that do not have both disciplines. Must be able to apply state-of-the-art applications that will effectively automate financial applications in the most effective manner while adhering to the established Accounting Principles and Practices.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Finance, Business, or other related technical discipline.

**General Experience:** Must have five (5) years of financial management experience.

**Specialized Experience:** At least three (3) years of experience in financial management with demonstrated ability in analyzing, designing, and developing automated applications for unique business practices in a fee-for-service environment.

#### 6. **Analyst, Financial (Senior)**

**Duties:** Provides financial management planning and execution support. Has knowledge of theories, principles and practices of financial management, including time value analyses, cash flow analyses and cost/benefit and return on investment analyses. Conducts investment analyses or other complex operational analyses. Provides expertise and support in conducting a full range of investment analyses activities, including market surveys, cost analyses, benefits analyses, risk analyses, economic analyses, requirements definitions, schedule development, and tradeoff studies. Supports architecture efforts including economic analyses of architecture alternatives, architecture issues resolutions, and affordability analyses. Classifies and summarizes financial data for the preparation and submission of reports on a recurring basis. Must to able to apply financial analysis to information systems issues.

**Education:** Bachelor's Degree from an accredited college or university in Economics, Business, Accounting, Finance, or related discipline.

**General Experience:** At least eight (8) years progressive experience as an analyst or involved in analyst type functions in a business related subject area such as accounting, finance or economics.

**Specialized Experience:** At least five (5) years of financial management experience with demonstrated ability in analyzing information systems.

#### 7. **Analyst, Research**

**Duties:** Analyzes existing and potential product and service information, prospective customers and markets. Collates information into meaningful reports and presentation material. Maintains any technical information in a systems library.

**Education:** High School Diploma or Associate's Degree in Business, or related field.

**General Experience:** A minimum of one (1) year of work experience in a business environment.

**Specialized Experience:** At least one (1) year of demonstrated experience word processing using electronic spreadsheets and other administrative software products. General knowledge of governmental documents and procedures.

#### 8. **Analyst, Systems (Senior)**

**Duties:** Serves as a computer systems expert on assignments that typically involve establishing automated systems, where concern is with overall life cycle structure; and conducts feasibility studies from design, implementation and post-implementation

evaluation from a number of possible approaches. Design criteria must be established to accommodate changes in legislation, mission, or functional program requirements.

**Education:** Bachelor's Degree from an accredited college or university in Computer Science, Systems Analysis, Information Systems or a related field.

**General Experience:** A minimum of eight (8) years of experience in information technology systems analysis.

**Specialized Experience:** At least five (5) years of the experience in the design of business applications on complex IT systems. Requires a broad knowledge of data sources, data flow, system interactions, advanced computer equipment and software applications, and advanced systems design techniques to develop solutions to unyielding complex problems and to advise officials on systems design and IT forecasts.

#### **9. Application Developer, Advanced Technology**

**Duties:** Must be able to translate applications requirements into web-based solutions using available technology. Must be able to apply new and emerging technologies to the software development process.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline or three (3) years of equivalent experience in a related field.

**General Experience:** Must have two (2) years of computer experience in at least two of the following disciplines: systems analysis, systems programming, application programming, and equipment analysis.

**Specialized Experience:** At least one (1) year of experience developing applications using advanced technologies, such as Internet protocols or web-based technology. Technologies include HTML, CGI applications, PERL or Javascript, and Java.

#### **10. Application Developer, Advanced Technology (Senior)**

**Duties:** Must be able to translate applications requirements into web-based solutions using available technology. Must be able to apply new and emerging technologies to the software development process.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline or five (5) years of equivalent experience in a related field.

**General Experience:** Must have three (3) years of computer experience in at least two (2) of the following disciplines: system analysis, system programming, application programming, and equipment analysis.

**Specialized Experience:** At least one (1) year of experience developing applications using advanced technologies, including Internet protocols or web-based technology. Technologies include HTML, CGI applications, PERL or Javascript, and Java.

#### **11. Applications Development Expert**

**Duties:** Provides design recommendations based on long-term IT organization strategy. Develops enterprise level application and custom integration solutions including major enhancements and interfaces, functions and features. Uses a variety of platforms to provide automated systems applications to customers. Provides expertise regarding the integration



of applications across the business. Determines specifications, then plans, designs, and develops the most complex and business critical software solutions, utilizing appropriate software engineering processes – either individually or in concert with a project team. Will assist in the most difficult support problems. Develops programming and development standards and procedures as well as programming architectures for code reuse. Has in-depth knowledge of state-of-the art programming languages and object-oriented approach in designing, coding, testing and debugging programs. Understands and consistently applies the attributes and processes of current application development methodologies. Researches and maintains knowledge in emerging technologies and possible application to the business. Viewed both internally and externally as a technical expert and critical technical resource across multiple disciplines. Acts as an internal consultant, advocate, mentor and change agent.

**Education:** A Bachelor's in Computer Science, Information Systems.

**General Experience:** At least seven (7) years of IT and business/industry work experience.

**Specialized Experience:** At least three (3) years as Technical expert in IT organization. Coaches and mentors more junior technical staff. Provides technical input into the most complex and high impact IT decisions. Accountable for the most complex enterprise-wide applications and issues, translating highly complex concepts for peers and customers.

## **12. Applications Programmer**

**Duties:** Analyzes functional business applications and design specifications for functional areas such as finance, accounting, personnel, manpower, logistics, and contracts. Develops block diagrams and logic flowcharts. Translates detailed design into computer software. Tests, debugs, and refines the computer software to produce the required product. Prepares required documentation, including both program-level and user-level documentation. Enhances software to reduce operating time or improve efficiency. Provides technical direction to programmers as required to ensure program deadlines are met.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline or three (3) years of equivalent experience in a related field.

**General Experience:** Must have five (5) years of computer experience in information systems design.

**Specialized Experience:** At least three (3) years of experience as an application programmer on large-scale DBMS, knowledge of computer equipment, and ability to develop complex software to satisfy design objectives.

## **13. Architect, Application (Senior)**

**Duties:** Manages major projects that involve providing professional support services and/or the integration, implementation and transition of large, complex systems. Provides design and development of e- government solutions, and is responsible for technical design and implementation of the architecture. Designs, develops and maintains infrastructure and backend applications. Provides expertise on defining the role of broadband and wireless applications. Provides definition of current State architecture blueprints. Provides expertise with web servers, gateways, and application servers and

content management systems. Provides experience in web application technologies and middleware solutions. Researches new technologies and products for their applicability to business processes. Must be able to compare various solutions and determine the most suitable. Ensures that development efforts are well planned and in agreement with standards.

**Education:** Bachelor's Degree from an accredited college or university in Engineering, Computer Science, Mathematics or other related scientific or technical discipline.

**General Experience:** At least ten (10) years of experience planning, designing, building, and implementing IT application systems. Must have led or been chief architect in a major IT applications implementation effort. Must have a strong background in software engineering principles and techniques.

**Specialized Experience:** At least six (6) years of experience in designing medium to large-scale sites and management of at least five Internet projects.

#### **14. Architect, Information Technology (Senior)**

**Duties:** Provides expertise in the most current principles and practices of architecture data management systems and experience in large system designs, and with data modeling in the information management arena. Provides expertise in modeling and organizing information to facilitate support of projects or information architectures. Provides guidance on how and what to data and process model. Primarily deals with transition planning from legacy to modern systems by concentrating on information flows, data exchange, and data translation standardization services.

**Education:** Bachelor's Degree from an accredited college or university with a major in Engineering, Computer Science, Mathematics or a related field.

**General Experience:** At least ten (10) years of experience planning, designing, building, and implementing IT systems.

**Specialized Experience:** At least five (5) years of the required ten (10) years of experience must be in the direct supervision and management of major projects that involve providing professional support services and/or the integration, implementation and transition of large complex system and subsystem architectures. Must have led or been chief architect in major IT implementation efforts. Must demonstrate a broad understanding of client IT environmental issues and solutions and be a recognized expert within the IT industry. Must demonstrate advanced abilities to team and mentor and possess demonstrated excellence in written and verbal communication skills.

#### **15. Architect, Internet/Web**

**Duties:** Responsible for analyzing assigned specifications, planning, designing and developing solutions, utilizing appropriate Internet/Intranet/Extranet architecture processes supporting a wide range of business process. Provides appropriate documentation for object design decisions, estimating assumptions, applets and performance metrics – as required by organization architecture process standards, or as assigned. Responsible for minimizing the issues between the client and the server applications and for the overall setup and design of the Internet and web server architecture. Impact and complexity of this job increases if organization is utilizing Internet solutions (vs. only Intranet), especially those with significant business impact (e.g., e-business).

**Education:** A Bachelor's Degree in Computer Science, Information Systems, or other related field or equivalent work experience.

**General Experience:** At least five (5) years of IT work experience.

**Specialized Experience:** Has worked independently or as a part of a team under general supervision and coached more junior technical staff. Technical expert in IT organization. Provides input into highly complex and high impacting decisions as it relates to area of expertise.

#### **16. Architect, Systems (Senior)**

**Duties:** Responsible for developing business, data, systems, and infrastructure models to develop enterprise architectures. Develops plans for migrating architectures. Develops technical reference models to include hardware/software standards. Engineer's integrated hardware and software solutions to meet mission requirements.

**Education:** Bachelor's Degree from an accredited college or university in Computer Science, Information Systems or related field or three (3) years of equivalent experience in a related field.

**General Experience:** Experience performing architecture related work on at least five (5) IT systems.

**Specialized Experience:** Experience performing a significant role in all aspects of architecture related work on at least two (2) large IT systems.

#### **17. Architect, Systems Design**

**Duties:** Must be able to lead team in developing application, development, network, and technical architectures for mid-range client/server and mainframe applications. Responsible for gathering and defining the architecture requirements and for ensuring that the architectures are compatible and in compliance with the appropriate IT organization and project standards.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline.

**General Experience:** Must have six (6) years of experience planning, designing, building, and implementing mid-range IT systems.

**Specialized Experience:** At least four (4) years of experience developing application, development, network, and technical architectures for mid-range client/server and mainframe applications. Demonstrated ability to develop and execute architecture strategies and to perform feasibility studies and integration analyses. Experience supervising and providing guidance in implementing various mid-range architectures and supporting implementation of large-scale applications.

#### **18. Audit Manager**

**Duties:** Performs day-to-day management of overall contract support operations, possibly involving multiple audits and groups of personnel at multiple locations. Responsible for the overall direction and guidance of all ongoing audits for the State; responsible for audit report(s) and all findings contained therein; in coordination with the State's designated representative, assists with the collection of any amounts due to the State as a result of audits. Organizes, directs, and coordinates the planning and production of all contract

support activities, including subcontractors. Develops work breakdown structures and prepares charts, tables, graphs, major milestone calendars and diagrams to assist in analyzing problems and making recommendations.

**Education:** Bachelor's Degree from an accredited college or university in Accounting, Business, Mathematics or a related technical or business field.

**General Experience:** At least four (4) years of audit experience. Such experience must have included the supervision of other auditors engaged in the audit process. Of information systems or telecommunications projects or operations.

**Specialized Experience:** At least two (2) years of experience in auditing contracts or projects in support of either the Federal or a state government.

#### **19. Auditor, IT (Senior)**

**Duties:** Identifies information processing and technology risks. Evaluates controls and makes recommendations. Identifies problems and recommends solutions. Reviews the installation and security related controls for a wide variety of computing platforms, including operating systems, sub-systems, databases and software products used to support the processing environment. Prepares and performs audit tests and evaluates results. Provides documentation of audit tests to facilitate efficient and effective reviews.

**Education:** CPA required. Bachelor's Degree from an accredited college or university in Accounting, Finance, Business, Computer Science, Information Systems, or related field.

**General Experience:** At least ten (10) years auditing experience.

**Specialized Experience:** At least seven (7) years of experience in IT audits. Proficient in generally accepted IT standards, statements and practices and IT security and control practices.

#### **20. Business Process Consultant (Senior)**

**Duties:** Develops business requirements and business processes re-engineering methodologies. Solves application and process related problems by creating detail process and system design specifications; and works with other areas across the business units to support a total solution approach. Communicates business requirements for reports and applications development. Facilitates collaboration within and across business units and across IT functions. Produces Business Process workflow diagrams and other business process artifacts. Resolves problems and improves business units' technical environments.

**Education:** Bachelor's Degree from an accredited college or university in Business, Human Resources Management or a related field.

**General Experience:** At least eight (8) years of experience in business process re-engineering.

**Specialized Experience:** At least five (5) years of experience in reengineering large scale business processes.

#### **21. Computer Graphics Illustrator**

**Duties:** Duties will include recommending various methods of portraying ideas and the design, layout, and generation of a variety of graphical presentation products from rough drafts or outlines. Must possess skill in the preparation of graphs, charts and text data for visual presentations. Duties will be performed using complex automated color graphic

equipment and PC software packages. A basic knowledge of graphic equipment, graphic software, file formats and graphic terms is required.

**Education:** High school diploma or equivalent. An additional year of specialized experience may be substituted for the required education.

**General Experience:** Three (3) years of experience in creating and generating graphics using computer graphics software.

**Specialized Experience:** None.

## **22. Computer Operations Center Specialist**

**Duties:** Establishes detailed schedules for utilization of all equipment in the computer operations center to obtain maximum usage. Consults with personnel in other data processing sections to coordinate activities, and prepare activity and progress reports regarding the computer operations center. Evaluates production, equipment and personnel costs. Analyzes and interprets technical data processing data. Communicates technical data processing information effectively both orally and in writing. Applies applicable rules, regulations, policies and procedures of the computer operations center.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline or three (3) years of equivalent experience in a related field.

**General Experience:** This position requires a minimum of five (5) years of experience in the IT field.

**Specialized Experience:** At least three (3) years of specialized experience working in a computer operations center. Ability to function in a multi-system and/or multi-application environment. Ability to operate and monitor multiple terminals. Knowledge of data processing operations, equipment, procedures, and workflow. Knowledge of environmental requirements of mainframes, servers and other hardware. Knowledge of emergency security procedures for a computer operations center.

## **23. Computer Operations Research Analyst**

**Duties:** Performs technical work in the operation of electronic computers and auxiliary peripheral equipment. Collates information into meaningful reports and presentation material. Maintains any technical information in a systems library. Applies principles and methods to obtain maximum utilization of computer equipment. Operates and cares for electronic computer and peripheral equipment.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline or three (3) years of equivalent experience in a related field.

**General Experience:** A minimum of one (1) year of work experience in a business environment.

**Specialized Experience:** At least one (1) year of demonstrated experience working in a computer operations center. Ability to function in a multi-system and/or multi-application environment. Ability to follow complex oral and written instruction. Ability to operate and monitor multiple terminals.

#### **24. Computer Programmer (Senior)**

**Duties:** Must be capable of utilizing third- and fourth-generation or current state-of-the-art IT equipment and languages to develop and prepare diagrammatic plans for solution of business, management, communications, and strategic problems. Must be able to design detailed programs, flowcharts, and diagrams showing mathematical computations and sequence of machine operations necessary to copy and process data and print results. Must be able to verify the accuracy and completeness of programs and systems by preparing sample representative data and perform testing by means of cycle and system processing.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline or three (3) years of equivalent experience in a related field.

**General Experience:** Must have eight (8) years of programming experience in software development or maintenance.

**Specialized Experience:** At least five (5) years of experience in IT systems analysis and programming.

#### **25. Computer Specialist**

**Duties:** Must be able to determine costs for converting computer systems from one language or machine to another by utilizing compilers, simulators, emulators, and/or language translators and recommend better utilization of operating systems capabilities to improve system efficiency. Must be able to develop, manage, maintain, and evaluate state-of-the-art computer hardware, software, and software development tools; evaluate their ability to support specific requirements and interface with other equipment and systems; determine potential and actual bottlenecks; propose recommendations for their elimination; and make recommendations for systems improvements that will result in optimal hardware and software usage.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline or three (3) years of equivalent experience in a related field.

**General Experience:** Must have five (5) years of computer experience in at least two (2) of the following disciplines: systems analysis, systems programming, application programming, or equipment analysis.

**Specialized Experience:** At least three (3) years of experience as either a computer hardware and/or systems software specialist, or as a systems analyst with duties relating to the evaluation of third- and fourth-generation or state-of-the-art computer hardware and software and its ability to support specific requirements for systems management or large-scale system development and maintenance.

#### **26. Computer Specialist (Senior)**

**Duties:** Must be able to determine costs for converting computer systems from one language or machine to another by using compilers, simulators, emulators, and/or language translators and to recommend better utilization of operating systems capabilities for improving system efficiency. Develops, manages, maintains, and evaluates current state-of-the-art computer hardware, software, and software development tools; evaluates

their ability to support specific requirements and interface with other equipment and systems; determines potential and actual bottlenecks and proposes recommendations for their elimination; and makes recommendations for system improvements that will result in optimal hardware and software use.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline or three (3) years of equivalent experience in a related field.

**General Experience:** Must have eight (8) years of computer experience in at least two of the following disciplines: system analysis, system programming, application programming, and equipment analysis.

**Specialized Experience:** At least five (5) years of experience either as a computer hardware or systems software specialist or as a systems analyst with duties relating to the evaluation of third and fourth generation of current state-of-the-art computer hardware and software and its ability to support specific requirements for hardware and software evaluation, system management, or large-scale system development and maintenance.

## **27. Computer Systems Programmer (Senior)**

**Duties:** Create and/or maintain operating systems, communications software, database packages, compilers, repositories, and utility and assembler programs. Modify existing operating systems or compiler software and develop special- purpose software to ensure efficiency and integrity between operating systems and applications.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science or Information Systems, or three (3) years of equivalent experience in a related field.

**General Experience:** Must have twelve (12) years of computer experience in systems programming at the operating system or compiler level.

**Specialized Experience:** At least five (5) years of experience with programming languages typically used for operating system or compiler development such as BLISS, C or assembly language.

## **28. Database Management Specialist (Senior)**

**Duties:** Must be capable of providing highly technical expertise and support in the use of DBMS. Must be able to evaluate and recommend available DBMS products to support validated user requirements. Defines file organization, indexing methods, and security procedures for specific user applications. Develops, implements, and maintains database back-up and recovery procedures for the processing environments, and ensures that data integrity, security, and recoverability are built into the DBMS applications.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline or three (3) years of equivalent experience in a related field.

**General Experience:** Must have six (6) years of experience in DBMS systems analysis and programming.

**Specialized Experience:** At least three (3) years of experience in using current DBMS technologies, application design utilizing various database management systems and

experience with DBMS internals.

**29. Documentation Specialist**

**Duties:** Gathers, analyzes, and composes technical information. Conducts research and ensures the use of proper technical terminology. Translates technical information into clear, readable documents to be used by technical and non-technical personnel. For applications built to run in a Windows environment, uses the standard help compiler to prepare all on-line documentation.

**Education:** Associate's Degree in related field.

**General Experience:** Must have four (4) years of experience in technical writing and documentation experience pertaining to all aspects of IT.

**Specialized Experience:** A minimum of two (2) years of experience in preparing technical documentation, which is to include researching for applicable standards.

**30. Electrician, Licensed Master**

**Duties:** Identify malfunctions in electrical and electro-mechanical instruments. Repair non-functioning electrical and electro-mechanical instruments. Calibrate scientific and industrial instruments. Use established maintenance procedures for scientific and industrial instruments. Test input/output parameters of electrical/mechanical devices. Assemble electrical and electro-mechanical devices. Identify electrical/electro-mechanical components, devices or systems in accordance with predetermined specifications. Present technical information in oral, written and graphic form, including use of microcomputers to manipulate content and access information.

**Education:** An Associate's degree from an accredited college or university in Electronics Technology or a related field; or Technical school certificate of completion in the electrical field; or the equivalent military training. An additional year of specialized experience may be substituted for the required education. Must have a master electrician license from the Maryland Board of Master Electricians.

**General Experience:** Seven (7) years of experience in the electronics or related field.

**Specialized Experience:** Five (5) years of experience in the following areas: design, construction, testing, installation, maintenance and repair of electronic systems.

**31. Engineer, Information (Senior)**

**Duties:** Develops analytical and computational techniques and methodology for problem solutions. Performs process and data modeling in support of the planning and analysis efforts using manual and automated tools; such as Integrated Computer-Aided Software Engineering (I-CASE) tools. Must be able to apply reverse engineering and reengineering disciplines to develop migration strategic and planning documents. Provides technical guidance in software engineering techniques and automated support tools. Must be capable of applying business process improvement practices to modernization projects. Applies, as appropriate, activity and data modeling transaction flow analysis; internal control and risk analysis; modern business methods; and performance measurement techniques. Assists in establishing standards for information systems procedures. Develops and applies organization wide information models for use in designing and building integrated, shared software and DBMS.

**Education:** A Bachelor's Degree from an accredited college or university with a major in



Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline.

**General Experience:** Must have eight (8) years of experience in managing the implementation of information engineering projects and experience in systems analysis, design and programming using CASE and IE tools and methods.

**Specialized Experience:** At least five (5) years of experience in information systems development, functional and data requirement analysis, systems analysis and design, programming, program design, and documentation preparation.

### **32. Engineer, Information Security**

**Duties:** Analyzes and defines security requirements for information protection. Defines and develops security policies. Analyzes the sensitivity of information, performs vulnerability and risk assessments on the basis of defined sensitivity and information flow.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline.

**General Experience:** This position requires a minimum of eight (8) years of experience in information protection.

**Specialized Experience:** At least five (5) years of experience in defining security programs or processes for the protection of sensitive or classified information.

### **33. Engineer, Inter disciplinary (Senior)**

**Duties:** Must have demonstrated ability to perform senior level engineering and/or IT tasks in the disparate areas of software, electronics telecommunications, or networking. Must be capable of translating mission requirements and information problems into solutions employing current state-of-the-art information system equipment and software. Must be able to define interaction with and/or interface between these different categories of requirements and to develop the appropriate design to support these requirements while employing methodologies from any of the above disciplines as required. Must be able to serve as a liaison to interpret and translate among the various disciplines represented on the task team, and serve as a point of contact for evaluation of problems arising from the interdisciplinary nature of the task.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline.

**General Experience:** Must have eight (8) years of experience in technical work in the major areas of system management and system integration.

**Specialized Experience:** At least five (5) years of experience in specialized IT and telecommunications disciplines involving system interfaces, system integration and network development, and/or integration involving a wide range of network, hardware, and software solutions. At least three (3) years in operating systems software, electronic communications analysis and design, or networking.

### **34. Engineer, Network (Senior)**

**Duties:** Responsible for the design and implementation of large data communications or telecommunications networks. Plans and monitors the installation of communications circuits. Manage and monitor local area networks and associated equipment (e.g., bridges, routers, modem pools, and gateways) Conducts short and long-term plan to meet c communications requirements. Responsible for the design and implementation of LANs/WANs using hub switching and router technology. Performs hardware/software analyses to provide comparative data of performance characteristics and suitability within the existing systems environment. Prepares tradeoff studies and evaluations for vendor equipment. Generates network monitoring/performance report, for LAN/WAN utilization studies. Recommends network design changes/enhancements for improved system availability and performance.

**Education:** A Bachelor's degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering or other related scientific or technical discipline. If applicable, shall be certified as network engineer for the specific network operating system as defined in the State task request. The certification criteria are determined by the network operating system vendor.

**General Experience:** Nine (9) years of experience in a computer-related field.

**Specialized Experience:** Seven (7) years of progressive experience in planning, designing, implementation, and analyzing data or telecommunications networks. Must have experience with network analysis/management tools and techniques and be familiar with Personal Computers (PCs) in a client/server environment. Must be familiar with IT technology and long distance and local carrier management.

### **35. Engineer, Network Security**

**Duties:** Designs, develops, engineers, and implements solutions for projects such as biometrics, smart cards, Secure remote access, VPN, Intrusion detection, port scanning, web security and vulnerability assessments and remediation.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline. A Master's Degree in one of the above disciplines equals one-year specialized and two years general experience. An additional year of specialized experience may be substituted for the required education.

**General Experience:** This position requires a minimum of eight (8) years of computer-related experience.

**Specialized Experience:** At least five (5) years of specialized experience in defining computer security requirements for high-level applications, evaluation of approved security product capabilities, and security management.

### **36. Engineer, Radio Frequency**

**Duties:** The RF Engineer position is responsible for several components of the new site construction process as well as monitoring and maintaining the performance of existing sites. The components of the new construction process include: creating a search area, selecting a site candidate, filing forms with the FAA and FCC, ordering the necessary site hardware, filing extension agreements with neighboring carriers and frequency / PN planning. This position is also responsible for RF coverage, radio talk-path capacity, and

organizing the logistics of cell site additions. The position also assists with budget preparations and performance troubleshooting.

**Education:** This position requires a 4-year college program with a Bachelor's Degree in Radio Engineering or Electrical Engineering or related field or equivalent vocational education, training, and experience with formal training in use of relevant administrative & industry specific tools (i.e. computer software and Internet).

**General Experience:** Point-to-point microwave systems and path analysis is mandatory.

**Specialized Experience:** Experience providing engineering support for large radio and microwave in a governmental environment.

### **37. Engineer, Software**

**Duties:** Reviews and analyzes system specifications. Prepares programming specifications. Analyzes existing systems/subsystems for reusability benefits and needed changes. Prepares design plans and written analyses. Prepares unit and test scripts. Prepares documentation.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline or three (3) years of equivalent experience in a related field.

**General Experience:** Must have three (3) years of experience as a software engineer.

**Specialized Experience:** At least two (2) years of experience working with programming languages including, but not limited to C+, Java or third/fourth generation languages in the design and implementation of systems and one (1) year working with a DBMS such as SQL Server or Oracle Database.

### **38. Engineer, Systems (Senior)**

**Duties:** Must be able to analyze information requirements. Must be able to evaluate problems in workflow, organization, and planning. Develops appropriate corrective action. Provides daily supervision and direction to staff.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline.

**General Experience:** Must have six (6) years of experience in systems engineering.

**Specialized Experience:** At least three (3) years of experience in the supervision of system engineers, and demonstrated use of interactive, interpretative systems with on-line, real-time acquisition capabilities.

### **39. Engineer Systems Design**

**Duties:** Must be able to perform design of information systems, including the design of the application architecture, database, and interfaces. Responsible for gathering and analyzing user requirements and translating them into system designs.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline.

**General Experience:** Must have six (6) years of experience planning, designing, building, and implementing IT systems. Familiar with Capability Maturity Model compliant structured methodology.

**Specialized Experience:** At least four (4) years of experience analyzing user requirements and translating them into system designs using various design tools and techniques. Demonstrated ability to develop and execute system designs, ensure implementation of repeatable processes, and ensure compliance with Capability Maturity Model (CMM) methodology.

#### **40. Facilities Engineering Manager**

**Duties:** Provides management and technical direction for facility, systems, and equipment repair, operation and maintenance. Provides oversight, strategic direction and technical support for the engineering, operation and maintenance of systems and subsystems.

**Education:** A Bachelor's degree from an accredited college or university in civil, mechanical, industrial or facilities management engineering or other related field.

**General Experience:** This position typically requires ten (10) years of experience in facilities management or related field.

**Specialized Experience:** Five (5) years of experience as a facilities manager or engineer in a large commercial building.

#### **41. Geographic Information Systems Specialist**

**Duties:** Conducts geographic information system (GIS) program activities, utilizing GIS hardware and software to produce maps, spatial databases and thematic data (such as wetlands, road centerlines, cadastre, and historic sites). Creates, adjusts, corrects, converts and distributes base maps and thematic data. Digitize and maintain spatial databases of Maryland information; document procedures, validate data for accuracy and completeness, complete approved metadata forms and produce maps of the resulting information. Evaluate information and data from outside sources to determine the quality of the data. Provide geographic location coordinates from the GIS to facilitate spatial analysis and data manipulation, calculate distances and area of features and interpret legal descriptions and certify changes in boundary lines. Act as a "consultant" to internal customers during their use, development and quality assessment of spatial databases.

**Education:** A Bachelor's Degree from an accredited college or university in Geography, GIS Technology, Cartography, Computer Science, or related field with at least nine (9) credit hours in courses specifically related to GIS operation/management.

**General Experience:** Four (4) years of professional experience is required in GIS, cartography, CAD, or a related field.

**Specialized Experience:** Familiarity with software packages typically used for GIS Technology or Cartography.

#### **42. Geospatial Web Developer (Senior)**

**Duties:** This is Senior GIS Software Developer position. Responsibilities include: install and configure ArcGIS Server; develop mapping applications and web services using ArcGIS Server for Flex and JavaScript/HTML5, build and publish maps via ArcGIS and ArcGIS Online resources, ArcSDE databases, and geo-processing tools as services in ArcGIS Server to streamline existing geospatial procedures; develop mobile GIS

applications, assume responsibility of full project lifecycle on simple projects; act proactively to avoid Requesting Agency customer issues and meet their business needs. The ideal candidate will also have experience developing for HTML 5, using open source geospatial software development tools, and developing for multiple PC, iOS, and Android platforms. This role also requires an understanding of project management, including all software development life cycle phases. A firm understanding of database architecture is also needed.

**Education:** Bachelor's from an accredited college or university in computer science, GIS, engineering, or related field; or four (4) years of equivalent experience in a related field.

**Experience:** At least four (4) years of experience working on GIS development projects.

**Specialized Experience:** At least three (3) years of experience using the following skills:

- Experience using GIS tools such as, but not limited to ESRI ArcGIS desktop Server and REST API's and ArcSDE.
- Experience using SQL databases such as but not limited to Oracle and SQL.
- Experience developing web mapping applications.

#### **43. Group Facilitator (Senior)**

**Duties:** Provides assistance in the group decision-making process by intervening to help a group improve its effectiveness and efficiency through enhanced problem identification, problem solutions and decision-making skills. Takes primary responsibility for managing the group process and assists groups to be more effective by improving existing group practices. Guides groups through proven processes and understands basic group dynamics and interrelationships. Intervenes when it is evident that the group process or other factors interfere with a group's ability to accomplish specific goals and objectives.

**Education:** Bachelor's Degree from an accredited college or university in Education, the Social Sciences, Human Resources, Business or a related field.

**General Experience:** At least five (5) years of experience as a group facilitator.

**Specialized Experience:** At least three (3) years of experience as a group facilitator involving technical projects.

#### **44. Help Desk Manager**

**Duties:** Provides daily supervision and direction to staff that are responsible for phone and in-person support to users in the areas of e-mail, directories, standard Windows desktop applications, and other network services. Manages personnel who serve as the first point of contact for troubleshooting hardware and software PC and printer problems.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline or three (3) years of equivalent experience in a related field.

**General Experience:** This position requires a minimum of seven (7) years of experience in the management of a Help Desk. General experience includes information systems development, network and other work in the client/server field, or related fields.

**Specialized Experience:** At least five (5) years of specialized experience includes management of help desks in a multi-server environment, comprehensive knowledge of PC operating systems (e.g., DOS, Windows), networking and mail standards, and

supervision of help desk employees. Demonstrated ability to effectively communicate orally and in writing and to have a positive customer service attitude.

#### **45. Internet/Intranet Site Developer (Senior)**

**Duties:** Must be able to translate applications requirements into the design of complex web sites, including integrating web pages and applications. Must be able to apply new and emerging technologies to the site development process.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline or three (3) years of equivalent experience in a related field.

**General Experience:** Must have five (5) years of web development experience using current Web development and graphic tools, as well as, Web Server and database administration.

**Specialized Experience:** At least three (3) years of experience designing, developing and deploying Web sites and/or Web applications, including product selection, configuration, installation, maintenance, and site specific Web development languages and relational databases.

#### **46. IV&V Manager**

**Duties:** Performs day-to-day management of overall contract support operations, possibly involving multiple IV&V reviews and groups of personnel at multiple locations. Responsible for the overall direction and guidance of all ongoing IV&V reviews for the State; responsible for report(s) and all findings contained therein; in coordination with the State's designated representative, assists with the collection of any amounts due to the State as a result of IV&V reviews. Organizes, directs, and coordinates the planning and production of all contract support activities, including subcontractors. Develops work breakdown structures and prepares charts, tables, graphs, major milestone calendars and diagrams to assist in analyzing problems and making recommendations.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline or three (3) years of equivalent experience in a related field. Must be certified as a Project Management Professional.

**General Experience:** At least ten (10) years auditing, project management or quality control experience.

**Specialized Experience:** At least five (5) years of experience in IT IV&V reviews, IT project management or IT quality control/quality assurance. Proficient in generally accepted IT standards (PMBOK), statements and practices and IT security and control practices.

#### **47. IV&V Supervisor**

**Duties:** Performs day-to-day management of assigned projects that involve teams of Lead Auditors and Staff Auditors. Primarily responsible for developing and overseeing the execution of the audit plan; regularly communicates with and reviews the work of on-site Lead and Staff Auditors and gives directions as appropriate; attends meetings with State representatives and is otherwise available to the State's representatives, as required.

Organizes, directs, and coordinates the planning and production of all activities associated with assigned projects. Prepares and presents program level management products such as, work breakdown structures, charts, tables, graphs, major milestone calendars and diagrams to assist in analyzing problems and making recommendations.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline or three (3) years of equivalent experience in a related field. Must be certified as a Project Management Professional.

**General Experience:** At least seven (7) years auditing experience.

**Specialized Experience:** At least three (3) years of experience in IT IV&V reviews, IT project management or IT quality control/quality assurance. Proficient in generally accepted IT standards (PMBOK), statements and practices and IT security and control practices.

#### **48. IV&V Analyst (Senior)**

**Duties:** Identifies information processing and technology risks. Evaluates controls and makes recommendations. Identifies problems and recommends solutions. Reviews the installation and security related controls for a wide variety of computing platforms, including operating systems, sub-systems, databases and software products used to support the processing environment. Prepares and performs audit tests and evaluates results. Provides documentation of audit tests to facilitate efficient and effective reviews.

**Education:** Bachelor's Degree from an accredited college or university in Accounting, Finance, Business, Computer Science, Information Systems, or related field. Must be certified as a Project Management Professional.

**General Experience:** At least seven (7) years auditing experience.

**Specialized Experience:** At least four (4) years of experience in IT IV&V reviews, IT project management or IT quality control/quality assurance. Proficient in generally accepted IT standards (PMBOK), statements and practices and IT security and control practices.

#### **49. IV&V Analyst**

**Duties:** Identifies information processing and technology risks. Evaluates controls and makes recommendations. Identifies problems and recommends solutions. Reviews the installation and security related controls for a wide variety of computing platforms, including operating systems, sub-systems, databases and software products used to support the processing environment. Prepares and performs audit tests and evaluates results. Provides documentation of audit tests to facilitate efficient and effective reviews.

**Education:** Bachelor's Degree from an accredited college or university in Accounting, Finance, Business, Computer Science, Information Systems, or related field.

**General Experience:** At least five (5) years auditing experience.

**Specialized Experience:** At least three (3) years of experience in IT IV&V reviews, IT project management or IT quality control/quality assurance. Proficient in generally accepted IT standards (PMBOK), statements and practices and IT security and control practices.

#### **50. IV&V Analyst (Junior)**

**Duties:** Identifies information processing and technology risks. Evaluates controls and makes recommendations. Identifies problems and recommends solutions. Reviews the installation and security related controls for a wide variety of computing platforms, including operating systems, sub-systems, databases and software products used to support the processing environment. Prepares and performs audit tests and evaluates results. Provides documentation of audit tests to facilitate efficient and effective reviews.

**Education:** Bachelor's Degree from an accredited college or university in Accounting, Finance, Business, Computer Science, Information Systems, or related field.

**General Experience:** At least two (2) years auditing experience.

**Specialized Experience:** At least one (1) years of experience in IT IV&V reviews, IT project management or IT quality control/quality assurance. Proficient in generally accepted IT standards (PMBOK), statements and practices and IT security and control practices.

#### **51. Market Research Consultant (Senior)**

**Duties:** Develops marketing and promotion strategies and tactics. Evaluates concepts for advertising campaigns. Develops and manages qualitative market research studies and develops reports. Analyses web site traffic and develops quantitative reports. Reviews marketing campaigns and their impact on web site audience behavior. Develops online survey questionnaires and launches surveys. Performs statistical analyses of responses to online surveys. Conducts various Internet analyses. Develops methodologies for optimum study results.

**Education:** Bachelor's Degree from an accredited college or university in Marketing, Business, or Statistics.

**General Experience:** At least eight (8) years of marketing research experience.

**Specialized Experience:** At least five (5) years of experience in technology marketing or a related field.

#### **52. Marketing Consultant (Senior)**

**Duties:** Develops marketing strategies for publications of State agencies' technology results and achievements. Develops marketing plans and recommends marketing strategies and measurements for the success of the marketing strategies. Provides survey results for State agencies on IT topics, completes applications for IT awards and develops periodic reports of IT accomplishments, including annual reports or other marketing-related documents.

**Education:** Bachelor's Degree from an accredited college or university in Marketing, Business, Communications or other related discipline.

**General Experience:** At least eight (8) years of marketing or communications experience.

**Specialized Experience:** At least five (5) years of experience in technology marketing or a related field.

#### **53. Master Scheduler**

**Duties:** Performs project and program level project scheduling activities to establish Work Breakdown Structure (WBS), establish preliminary schedules and manpower loading as a basis for price estimation, establish project/program integrated master project schedules incorporating project schedules from separate organizations and contractors to establish an overall integrated project schedule, perform resource leveling activities to



ensure that the level of effort and skills provided are capable of executing the project/program in the time estimated, establish baseline schedules setting performance objectives and milestones to be used to measure future project/program progress and attainment of contract objectives, update integrated project schedules with inputs from other organizations and contractors to maintain an accurate indicator of project/program progress, provide schedule status reports to provide project management and executive management an accurate assessment of progress on a project/program as compared to established project baselines. This status information can contain achievement of key milestones, critical path analysis or EVM analysis

**Education:** Bachelor's Degree from an accredited college or university in Engineering, Computer Science, Information Systems, Business, Mathematics or a related technical or business field.

**General Experience:** At least eight (8) years of progressive experience in the area of project scheduling and management with at least two (2) years of experience as a master scheduler on a project or program with a project duration longer than one (1) year and a project cost in excess of \$2,000, 000.

**Specialized Experience:** At least five (5) years of experience with project scheduling tools such as Microsoft Project, Primavera, or other scheduling tool.

#### **54. Network Manager**

**Duties:** Performs a variety of network management functions in support of MIS services related to the operation, performance, or availability of data communications networks. Modifies command language programs, network start up files, assigns/re-assigns network device logical, analyzes network performance and recommends adjustments to wide variety of complex network management functions with responsibility for overall performance and availability of networks. LAN/WAN consultant skilled in network analysis, integration and tuning. Experience with cable/LAN meters, protocol analyzers, Simple Network Management Protocol (SNMP) and Remote Monitoring (RMON) based software products. Knowledge of Ethernet, FDDI and high speed WANs, routers, bridges, and switches. Analyze client LANs/WANs, isolate source of problems, and recommend reconfiguration and implementation of new network hardware to increase performance. Working knowledge of network operating systems. Conducts load balancing efforts to achieve optimum device utilization and network performance. Manages network Email functions. Establishes mailboxes and monitors mail performance on the network. Coordinates with communications engineering to resolve hardware problems. Works with customer and operations staff in scheduling preventative and emergency maintenance activities.

**Education:** A Bachelor's degree from an accredited college or university with a major in Computer Science, Information Technology, Engineering, or a related discipline. If applicable, shall be certified as network engineer for the specific network operating system as defined in the State task request. The certification criteria are determined by the network operating system vendor.

**General Experience:** Twelve (12) years of experience in a computer-related field.

**Specialized Experience:** Ten (10) years of experience in one or more of the following areas: data communications engineering, data communications hardware or software

analysis, network administration or management, or have data communication equipment installation and maintenance. Knowledge of cable including FDDI, FOIRL, and 10Base T.

#### **55. Operations Research Analyst (Senior)**

**Duties:** Conducts investment analyses or other complex operational analyses. Provides expertise and supports evaluations of program results and potential changes to program results related to IT investments along with an analysis and presentations of alternatives. Provides operational analyses support to all phases of the life cycle of an information system. Conducts operational analyses of existing systems using performance measures, criteria, and standards to determine requirements for needed changes. Evaluates, selects, and uses the tools of modern operations research (such as commercially available decision and analytical support software tools) to conduct analyses of projected changes to system or program performance. Supports architecture efforts including economic analyses of architecture alternatives, architecture issues resolutions, and affordability analyses.

**Education:** Bachelor's Degree from an accredited college or university in a related field, with at least 24 semester hours in a combination of mathematics, probability, statistics and logic.

**General Experience:** Must have eight (8) years of experience in operations research.

**Specialized Experience:** At least five (5) years of experience in conducting quantitative analysis using operations research tools, econometrics, or other quantitative techniques.

#### **56. Planner, Information Technology (Senior)**

**Duties:** Provides planning services for a wide range of programs and projects including design, development, implementation, post-implementation and maintenance of the systems. Provides SWOT analyses, critical success factor analyses, strategic business planning, strategic information systems planning, value chain analyses, e-business assessments, and other techniques used to establish strategic plans. Provides expertise in conducting research, evaluations, and studies required to develop both short- term and long-term plans. Provides plans, designs, concepts, and develops both general and specific program and project strategies for linking proposed investments in IT to business results. Provides planning, scheduling, networking and coordination assistance among State organizations involved in implementation and integration efforts. Identifies problems and recommends solutions.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Planning or other related scientific or technical discipline.

**General Experience:** At least ten (10) years progressive experience as an IT planner - or involved in planning type functions.

**Specialized Experience:** At least six (6) years of experience in planning, analyses, design, development, implementation and post-implementation of IT projects or systems.

#### **57. Process Consultant (Senior)**

**Duties:** Develops business requirements and business processes re-engineering methodologies. Solves application and process related problems by creating detail process and system design specifications; and works with other areas across the business units to support a total solution approach. Communicates business requirements for reports and

applications development. Facilitates collaboration within and across business units and across IT functions. Resolves problems and improves business units' technical environments.

**Education:** Bachelor's Degree from an accredited college or university in Business, Human Resources Management or a related field.

**General Experience:** At least eight (8) years of experience in business process re-engineering.

**Specialized Experience:** At least five (5) years of experience in reengineering large scale business processes.

#### **58. Program Manager**

**Duties:** The Program Manager serves either as the Master Contractor's manager for a contract with multiple projects or as the Requesting Agency's primary representative for a group of related projects. The Project Manager may also serve as the senior, single point of contact for a Master Contractor with the State regarding multiple contracts. The Program Manager supports multiple projects and manages project managers, performs overall management for Contract support operations, organizes, directs, and coordinates the planning and production of all Contract activities, projects and support activities, including those of subcontractors, oversees the development of or develops work breakdown structures, charts, tables, graphs, major milestone calendars and diagrams to assist in analyzing problems and making recommendations, demonstrates excellent written and verbal communications skills, establishes and alters corporate management structure to direct effective and efficient contract support activities and is capable of negotiating and making binding decisions for the Master Contractor.

**Education:** Bachelor's Degree from an accredited college or university in Engineering, Computer Science, Information Systems, Business or other related discipline. Must be certified as a Project Management Professional or equivalent project management certification.

**General Experience:** At least twelve (12) years of experience in a project management role with IT programs.

**Specialized Experience:** At least five (5) years of successful experience serving in the role of a program manager with responsibility for multiple IT projects.

#### **59. Project Control Specialist**

**Duties:** Monitors financial and/or administrative aspects of assigned contracts and deliverables. Tracks and validates all client financial information, establishes and maintains master contract files, prepares and monitors status of all deliverables and tracks the value of contracts. Uses automated systems to track deliverables, financial transactions, and management information.

**Education:** High School Diploma or equivalent.

**General Experience:** Must have three (3) years of experience working with monitoring systems. Familiar with manpower and resource planning, preparing financial reports and presentations, and cost reporting contract guidelines.

**Specialized Experience:** Preparation and analysis of financial statements, development of project schedules, using cost-accounting and labor-reporting systems, working knowledge

of contract and subcontract management. Proficient in the use of spreadsheets and project management tools.

#### **60. Project Manager**

**Duties:** The Project Manager is assigned the management of a specific project and the work performed under assigned Task Orders. Performs day-to-day management of the project, identifies issues and risks and recommends possible issue and risk mitigation strategies associated with the project. Acts as a facilitator between a State agency and IT contractor. Is responsible for ensuring that work performed under TOs is within scope, consistent with requirements, and delivered on time and on budget. Identifies critical paths, tasks, dates, testing, and acceptance criteria. Provides solutions to improve efficiency (e.g., reduce costs while maintaining or improving performance levels). Monitors issues and provides resolutions for up-to-date status reports. Demonstrates excellent writing and oral communications skills.

**Education:** Bachelor's Degree from an accredited college or university in Engineering, Computer Science, Information Systems, Business or other related discipline. Project Management Professional or other equivalent project management certification required.

**General Experience:** At least five (5) years of experience in project management.

**Specialized Experience:** At least five (5) years of experience in managing IT related projects and must demonstrate a leadership role in at least three successful projects that were delivered on time and on budget.

#### **61. Quality Assurance Consultant (Senior)**

**Duties:** Provides quality management for information systems using the standard methodologies, techniques, and metrics for assuring product quality and key activities in quality management. Establish capable processes, monitoring and control of critical processes and product mechanisms for feedback of performance, implementation of an effective root cause analysis and corrective action system, and continuous process improvement. Provides strategic quality plans in targeted areas of the organization. Provides QA strategies to ensure continuous production of products consistent with established industry standards, government regulations and customer requirements. Develops and implements life cycle and QA methodologies and educates, and implements QA metrics.

**Education:** Bachelor's Degree from an accredited college or university in Engineering, Computer Science, Information Systems or other related discipline.

**General Experience:** At least eight (8) years information systems quality assurance experience. **Specialized Experience:** At least five (5) years of experience working with statistical methods and quality standards. Must have good QA/process knowledge and possess superior written and verbal communication skills.

#### **62. Quality Assurance Manager**

**Duties:** Must be capable of maintaining and establishing a process for evaluating software and associated documentation. Must be able to determine the resources required for quality control. Must be able to maintain the level of quality throughout the software life cycle. Develops software quality assurance plans. Conducts formal and informal reviews at predetermined points throughout the development life cycle.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline.

**General Experience:** Must have six (6) years of experience in quality assurance and quality control.

**Specialized Experience:** At least three (3) years of experience in verification and validation, software testing and integration, software metrics, and their application to software quality assessment.

### **63. Quality Assurance Specialist**

**Duties:** Must be able to determine the resources required for quality control. Must be able to maintain the level of quality throughout the software life cycle. Develops software quality assurance plans. Must be capable of maintaining and establishing a process for evaluating software and associated documentation. Participates in formal and informal reviews at predetermined points throughout the development life cycle to determine quality. Examines and evaluates the software quality assurance (SQA) process and recommends enhancements and modifications. Develops quality standards.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline.

**General Experience:** Must have five (5) years of experience working with quality control methods and tools.

**Specialized Experience:** At least three (3) years of experience in verification and validation, software testing and integration, software metrics, and their application to software quality assessment, and a demonstrated knowledge of system and project life cycles.

### **64. Risk Management Consultant (Senior)**

**Duties:** Manages the identification and reporting on risk assessments and updates evaluations in order to determine and forecast operational needs and changes. Provides presentations on reporting and operational enhancements and metrics with special focus on variance analysis. Establish risk management policies and procedures, and guidelines on risk limits. Provides fraud expertise on services to internal and external customers. Develops system enhancements and meaningful reporting and operational management reporting tools and web-based tools and programs to manage, prevent, and mitigate risks. Identifies problems and recommends solutions to risk assessments.

**Education:** Bachelor's Degree from an accredited college or university in a related field.

**General Experience:** At least ten (10) years of risk management experience.

**Specialized Experience:** At least six (6) years of experience in IT risk management.

### **65. Security, Computer Systems Specialist**

**Duties:** Analyzes and defines security requirements for information systems. Designs, develops, engineers, and implements solutions for information systems requirements. Gathers and organizes technical information about an agency's mission goals and needs, existing security products, and ongoing programs... Performs risk analyses, which also include risk assessment. Provides daily direction to staff.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline or four (4) years of equivalent experience in a related field.

**General Experience:** This position requires a minimum of six (6) years of experience in analysis and definition of security requirements.

**Specialized Experience:** At least four (4) years of specialized experience in defining computer security requirements for high-level applications, evaluation of approved security product capabilities, and developing solutions to MLS problems.

#### **66. Security, Data Specialist**

**Duties:** Responsible for the planning, design, implementation and monitoring of security measures, policies, methods and procedures which safeguard the integrity of and access to enterprise systems, files and data elements. Responsible for acting on security violations. Maintains knowledge of changing technologies, and provides recommendations for adaptation of new technologies or policies. Recognizes and identifies potential areas where existing data security policies and procedures require change, or where new ones need to be developed, especially regarding future business expansion. Provides management with risk assessments and security briefings to advise them of critical issues that may affect customer, or corporate security objectives.

**Education:** A Bachelor's Degree in Computer Science, Information Systems, or other related field or equivalent work experience.

**General Experience:** At least four (4) years of IT work experience in data security.

**Specialized Experience:** Has worked independently or as part of a team under general supervision and coached more junior technical staff.

#### **67. Subject Matter Expert**

**Duties:** Defines the problems and analyzes and develops plans and requirements in the subject matter area for moderately complex-to-complex systems. Coordinates and manages the preparation of analysis, evaluations, and recommendations for proper implementation of programs and systems specifications including, but not limited to: information technology, health care, education, public safety, social services, human resources, transportation, and environment.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline.

**General Experience:** Must have seven (7) years of experience in the IT field.

**Specialized Experience:** At least five (5) years of combined new and related older technical experience in the IT field directly related to the required area of expertise.

#### **68. Subject Matter Expert (Senior)**

**Duties:** The area of expertise may be related to a specific discipline required by the State agency including, but not limited to: information technology, health care, education, public safety, social services, human resources, transportation, and environment. Requires expertise in the formulation of specifications and in the execution of technical initiatives in

vertical areas. Defines requirements, performs analyses, and develops plans and requirements for systems.

**Education:** Bachelor's Degree from an accredited college or university in the specific discipline required by the State.

**General Experience:** At least twelve (12) years of relevant industry experience in the discipline is required.

**Specialized Experience:** At least ten (10) years of combined new and related older technical experience in the IT field directly related to the required area of expertise.

#### **69. Systems Analyst, Wireless**

**Duties:** Define and develop Key Performance Indicators to measure Quality of Service of wireless voice & data services and end-to-end applications that run on top of wireless data bearers. Design and develop post-processing engines that extract and transform raw low-level performance data into aggregate metrics; automate and parameterize the process for large scale processing in an efficient and timely manner; build-in QC check-points for end-to-end quality verification. Analyze, trouble-shoot, and investigate normal and abnormal use-cases for voice and data services; trace anomalies to corresponding impact on key metrics.

**Education:** A Bachelor's degree in Electrical Engineering, Computer Science, or related discipline is required.

**General Experience:** Minimum of four (4) years of direct experience in development for wireless devices or wireless network equipment is required.

**Specialized Experience:** Detailed in-depth understanding of wireless systems architecture, protocols, and standards is required. Strong technical ability, communication skills, and ability to quickly learn new technologies are required.

#### **70. System Security Specialist**

**Duties:** Provides expert-level advice, analysis, and functional expertise to tasks. Demonstrates exceptional oral and written communication skills. Reviews requirements and task documentation for accuracy and applicability.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline.

**General Experience:** This position requires a minimum of 12 years of experience in system security.

**Specialized Experience:** At least seven (7) years of highly specialized experience in one or more information, computer, or network security disciplines. These disciplines could include penetration testing, intrusion detection and audit analysis, public key infrastructure, cryptography, strong authentication, risk analysis, and multilevel security.

#### **71. Systems Security Specialist (Senior)**

**Duties:** Analyzes and defines security requirements for Multilevel Security (MLS) issues. Designs, develops, engineers, and implements solutions to MLS requirements. Responsible for the implementation and development of the MLS. Gathers and organizes technical information about an organization's mission goals and needs, existing security products,

and ongoing programs in the MLS arena. Performs risk analyses, which also include risk assessment. Provides daily supervision and direction to staff.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline.

**General Experience:** This position requires a minimum of eight (8) years of experience in analysis and definition of security requirements.

**Specialized Experience:** At least five (5) years of specialized experience in defining computer security requirements for high-level applications, evaluation of approved security product capabilities, and developing solutions to MLS problems.

#### **72. Telecommunications Consultant (Senior)**

**Duties:** Identifies problems and recommends solutions for telecommunications organizations. Performs process and data modeling in support of the planning and analyses for using automated tools. Evaluates controls and makes recommendations. Provides planning, analyses, strategic planning, design, development, implementation and post-implementation for telecommunications projects.

**Education:** Bachelor's Degree from an accredited college or university with a major in Telecommunications, Computer Science, Information Systems, Engineering or a related field.

**General Experience:** At least ten (10) years telecommunications experience.

**Specialized Experience:** At least seven (7) years of experience as a consultant or engineer in the telecommunications field in the private or public sector.

#### **73. Telecommunications Engineer (Senior)**

**Duties:** Provides engineering and technical support for statewide telecommunications projects and services. Provides designs and applications to insure overall technical integrity. Provides high-level planning for the systems used by telecommunications organizations. Performs process and data modeling for the planning and analyses of automated tools. Provides technical expertise and guidance in engineering techniques and automated support tools. Provides assistance with planning, design, cost/benefit analyses, assessment of configurations and performance measurements, development, implementation and recommendations for staffing levels for telecommunications systems and processes.

**Education:** Bachelor's Degree from an accredited college or university in Engineering, Telecommunications, Computer Science, Information Systems or other related scientific or technical discipline.

**General Experience:** At least ten (10) years of telecommunications experience.

**Specialized Experience:** At least six (6) of experience in commercial and long distance network architectural design and engineering.

#### **74. Telecommunications Systems Analyst**

**Duties:** Must be capable of planning, analysis, design, development, and maintenance of operations support systems used by telecommunications organizations. Must be capable of performing business systems planning, information planning, and analysis in support of telecommunications support functions, including billing, trouble ticket management,



service order entry, and/or configuration management. Performs process and data modeling in support of the planning and analysis efforts using both manual and automated tools. Provides technical guidance in software engineering techniques and automated support tools.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Telecommunications, Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline.

**General Experience:** Must have five (5) years of experience in engineering, systems analysis, design and programming.

**Specialized Experience:** At least two (2) years of experience in functional and data requirement analysis, systems analysis and design, programming, program design of billing, trouble ticket management, service order entry, and/or configuration management systems supporting operations of large telecommunications support organizations.

#### **75. Testing Specialist**

**Duties:** Must be capable of designing and executing IT software tests and evaluating results to ensure compliance with applicable regulations. Must be able to prepare test scripts and all required test documentation. Must be able to design and prepare all needed test data. Analyzes internal security within systems. Reviews test results and evaluates for conformance to design.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline or three (3) years of equivalent experience in a related field.

**General Experience:** Must have four (4) years of experience in computer software development.

**Specialized Experience:** At least two (2) years of software testing experience (integration and acceptance).

#### **76. Training Specialist/Instructor**

**Duties:** Conducts the research necessary to develop and revise training courses and prepares appropriate training catalogs. Prepares all instructor materials (course outline, background material, and training aids). Prepares all student materials (course manuals, workbooks, handouts, completion certificates, and course critique forms). Trains personnel by conducting formal classroom courses, workshops, and seminars.

**Education:** A Bachelor's Degree from an accredited college or university with a major in Education/Training in the areas of Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline.

**General Experience:** Must have four (4) years of experience in information systems development, training, or related fields.

**Specialized Experience:** At least two (2) years of experience in developing and providing IT and end user training on computer hardware and application software.

#### **77. Technical Writer /Editor**

**Duties:** Assists in collecting and organizing information for preparation of user manuals, training materials, installation guides, proposals, and reports. Edits functional descriptions,

system specifications, user manuals, special reports, or any other customer deliverables and documents. Conducts research and ensures the use of proper technical terminology. Translates technical information into clear, readable documents to be used by technical and non-technical personnel. For applications built to run in a Windows environment, uses the standard help compiler to prepare all on-line documentation. Assists in performing financial and administrative functions. Must demonstrate the ability to work independently or under only general direction.

**Education:** Associate's Degree in related field.

**General Experience:** A minimum of five (5) years of experience in this area.

**Specialized Experience:** At least two (2) years of experience in preparing and editing documents, including technical documents. Also includes researching for applicable standards.

## **2.8 PROJECT MANAGEMENT PLAN (PMP)**

The TO Contractor shall use the PMP provided with its proposal to this RFP as the baseline project management plan in performing any IV&Vs requested in a TORFP unless otherwise modified for a specific TORFP. In those cases, the TO Contractor may provide a revised PMP to address the unique nature of the IAS.

## **2.9 STAFFING PLAN**

The TO Contractor shall use the Staffing Plan provided with their proposal to this RFP as the baseline staff management plan in performing any IAS engagements requested in a TORFP. The TO Contractor may modify the Staffing Plan as necessary to adapt to the specific requirements of each TORFP.

## **2.10 DELIVERABLES DESCRIPTIONS, ACCEPTANCE CRITERIA, AND TIME OF PERFORMANCE**

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

1. Be presented in a format appropriate for the subject matter and depth of discussion.
2. Be organized in a manner that presents a logical flow of the deliverable's content.
3. Represent factual information reasonably expected to have been known at the time of submittal.

The deliverables, acceptance criteria and required time frames for completion based on NTP will be defined in the TORFP table for each solicitation. Deliverables may be submitted earlier than indicated.

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. Accepted deliverables shall be invoiced within 30 days in the applicable invoice format (Section 2.13 Invoicing).

## **2.11 REPORTS**

### 2.11.1 MBE Reporting

Monthly reporting of MBE participation is required in accordance with the terms and conditions of this TO Contract by the 15<sup>th</sup> day of each month. The TO Contractor shall provide a completed MBE Participation form (Attachment D, Form 4-5) to the designated Requesting Agency. The TO Contractor shall ensure that each MBE Subcontractor provides a completed MBE Participation Form (Attachment D, Form 4-6). Subcontractor reporting shall be sent directly from the subcontractor to Requesting Agency. Requesting Agency will monitor both the TO Contractor's efforts to achieve the MBE participation goal and compliance with reporting requirements. The TO Contractor shall email all completed forms, copies of invoices and checks paid to the MBE directly to the MBE Officer and TO Manager.

### 2.11.2 Contract Management Oversight Activities Report

DoIT may be performing DoIT contract management oversight on the Master Contract. As part of that oversight, DoIT has implemented a process for self-reporting contract management activities of TO Agreements. This process shall typically apply to active TO Agreements for services valued at \$1 million or greater, but all TO Agreements are subject to review as required by DoIT's oversight.

TO Contractors shall comply with oversight requirements as specified in a TORFP.

### 2.11.3 Specialized Reports

Additional reports may be requested in the TORFP.

## **2.12 INSURANCE REQUIREMENTS**

The Master Contractor shall maintain property and casualty insurance with minimum limits sufficient to cover losses resulting from or arising out of Master Contractor action or inaction in the performance of the contract by the Master Contractor, its agents, servants, employees or subcontractors.

The Master Contractor shall maintain a policy of general liability insurance that is of the proper type and of sufficient limits that the State and its officials, employees, agents, servants, guests and subcontractors are reasonably covered in the event of injury or death.

The State of Maryland will be named as an additional named insured on the policies of all property, casualty, liability, and other types of insurance evidencing this coverage.

Certificates of insurance evidencing this coverage will be provided prior to the commencement of any activities in the Contract. All insurance policies shall be with a company licensed to do business in Maryland.

## **2.13 INVOICING**

All invoices shall be submitted monthly no later than 15 calendar days after the end of the invoice period, unless specified differently in the TORFP, and include the following

information unless superseded by direction in the TORFP or by written notification by the TO Manager:

- name and address of the Agency being billed,
- vendor name,
- remittance address,
- federal taxpayer identification or (if owned by an individual) his/her social security number,
- invoice period,
- invoice date,
- invoice number,
- amount due,
- retainage (if applicable), and
- Purchase order number(s) being billed.

Additional information may be required in the future. Invoices submitted without the required information will not be processed for payment until the TO Contractor provides the required information.

The TO Contractor shall submit the invoices to the Agency identified in the TORFP. The State is generally exempt from Federal excise taxes, Maryland sales and use taxes, District of Columbia sales taxes and transportation taxes. The TO Contractor(s), however, is/are not exempt from such sales and use taxes and may be liable for the same.

Additional invoicing requirements for T&M, Fixed Price, Business Beneficial, Revenue Neutral, or Commission-Only will be established in each TORFP.

Material invoices can only be approved for cost. No additional fees or markups shall be allowed. All material invoices shall be signed and dated by the TO Contractor and the original supplier's invoice shall be submitted and attached along with the applicable monthly invoice.

#### **2.14 RETAINAGE**

The State reserves the right to establish retainage for any TORFP issued under this Master Contract, provided that no retainage exceeds 10%. Retainage conditions will include: 1) the percentage of retainage, 2) whether retainage is cumulative, and 3) the timeframe(s) and conditions(s) for release of retainage. These conditions will be defined in the TORFP.

Retainage will not be held by the State for any material costs. The TO Contractor shall note the material costs (estimated if necessary) on their response to the TORFP.

#### **2.15 TRAVEL REIMBURSEMENT**

Routine Travel is defined as travel within a 50-mile radius of the Requesting Agency's base location, as identified in the TORFP, or the TO Contractor's facility, whichever is closer to the consulting site. There will be no payment for labor hours for travel time or reimbursement for any travel expenses for work performed within these radiuses or at the TO Contractor's facility.

Non-routine travel is defined as travel beyond the 50-mile radius of Agency's base location, as identified in the TORFP, or the TO Contractor's facility, whichever is closer to the consulting site. Non-routine travel will be identified within a TO Agreement, if appropriate, and will be reimbursed according to the State's travel regulations and reimbursement rates, which can be found at: [www.DBM.maryland.gov](http://www.DBM.maryland.gov) - search: Fleet Management. If non-routine travel is

conducted by automobile, the first 50 miles of such travel will be treated as routine travel and as described above, and will not be reimbursed. The TO Contractor may bill for labor hours expended in non-routine traveling beyond the identified 50-mile radius, only if so specified in the TORFP.

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## **SECTION 3 - PROPOSAL FORMAT**

### **3.1 TWO PART SUBMISSION**

Offerors shall submit proposals in two (2) separate volumes:

- Volume I - TECHNICAL PROPOSAL
- Volume II - PRICE PROPOSAL

Offerors shall follow the instructions within this section.

### **3.2 PROPOSALS**

Offerors shall propose services the Offeror has the ability to provide and how the Offeror qualifies to perform those services.

All pages of both proposal Volumes shall be consecutively numbered from beginning (Page 1) to end (Page “x”).

### **3.3 SUBMISSION**

Each Offeror is required to submit a separate sealed package for each Volume, which is to be labeled Volume I - Technical Proposal and Volume II - Price Proposal respectively. Each sealed package shall bear the RFP title and number, name and address of the Offeror, the Volume number (I or II) and closing date and time for receipt of the proposals on the outside of the package.

Offerors shall submit only one (1) Technical Proposal and one (1) Price Proposal simultaneously to the Procurement Officer.

### **3.4 VOLUME I – TECHNICAL PROPOSAL**

#### **3.4.1 Format of Technical Proposal**

Inside a sealed package described in Section 3.3, above, Offeror will provide:

1. One (1) unbound original copy of the Technical Proposal, so labeled, one (1) copy and the electronic version. Section 2 of this RFP provides requirements and Section 3 provides reply instructions. The paragraphs in these RFP sections are numbered for ease of reference. In addition to the instructions below, the Offeror’s Technical Proposal shall be organized and numbered in the same order as this RFP. This proposal organization will allow State officials and the Evaluation Committee to “map” Offeror responses directly to RFP requirements by paragraph number.
2. One (1) unbound original copy of the Project Management Plan, so labeled, one (1) copy and an electronic version
3. One (1) unbound original copy of the Project Schedule in GANTT format one (1) copy and an electronic version.

CDs or flash drives shall be labeled on the outside containing the RFP number and name, the name of the Offeror, and the Volume number.

The Technical Proposal shall include the following sections in this order:

**3.4.2.1. Title and Table of Contents**

The Technical Proposal shall begin with a title page bearing the name and address of the Offeror and the name and number of this RFP. A table of contents shall follow the title page for the Technical Proposal.

**3.4.2.2. Transmittal Letter**

A transmittal letter shall accompany the Technical Proposal. The purpose of this letter is to transmit this proposal and acknowledge receipt of any addenda. The transmittal letter should be brief and signed by an individual who is authorized to commit the Offeror to the services and requirements as stated in the RFP

**3.4.2.3. Section 1: Executive Summary**

The Offeror shall condense and highlight the contents of the Technical Proposal in a separate section titled “Executive Summary”. The summary shall provide a broad overview of the contents of the entire proposal. The summary shall identify any exceptions the Offeror has taken to the requirements of this RFP, the Contract (Attachment A), or any other attachments. If there are no exceptions are taken, the Offeror is to state that they have no exceptions to the requirements of this RFP, the Contract (Attachment A), or any other attachments. Exceptions to terms and conditions may result in having the proposal deemed unacceptable or classified as not reasonably susceptible of being selected for award.

**3.4.2.4. Section 2: General Information**

Section 2 of the proposal shall contain a general description of the Offeror and its capabilities.

**3.4.2.5. Section 3: Proposed Solution**

Section 3 of the proposal shall contain a detailed discussion of the Offeror’s understanding of the work entailed to address the requirements outlined in Section 2 - Scope of Work and how the Offeror proposes to satisfy the requirements. This section should include a detailed description of the Offeror’s proposed IAS methodology (ies) and services as required by Section 2.

**3.4.2.6. Section 4: Compliance with Master Contractor Minimum Qualifications**

Offerors will provide the following table to demonstrate compliance with the Master Contractor Minimum Qualifications found in Section 2.4.

Reference	Minimum Qualifications	Evidence of Compliance
2.4.1	Six (6) examples within the last three years of IAS or equivalent quality assurance engagements on IT development projects for commercial or government entities.	For each of the six examples provide: <ul style="list-style-type: none"> <li>• Name of entity supported</li> <li>• Contact name, phone and email address</li> <li>• Which of the three areas specified in 2.4.1 were supported</li> </ul>

Reference	Minimum Qualifications	Evidence of Compliance
		<ul style="list-style-type: none"> <li>• Start and finish dates</li> <li>• Cost of project supported</li> </ul>
2.4.2	Identify three (3) projects from the list provided above which had project value in excess of \$10,000,000	Names and cost of projects from the above list which had project value in excess of \$10,000,000.
2.4.3	Identify one (1) project from the list provided above which had a project value in excess of \$15,000,000.	Name of project and cost from the above list which had project value in excess of \$15,000,000.

**3.4.2.7. Section 5: Initial Risk Assessment**

The Offeror shall provide an initial risk assessment that identifies and prioritizes risks inherent in meeting the requirements in Section 2 - Scope of Work and a description of strategies to mitigate, accept, or transfer identified risks.

**3.4.2.8. Section 6: Offeror’s Project Management Plan**

The Offeror shall provide an IAS Project Management Plan (PMP) compliant with the Maryland SDLC as a separate Microsoft Word document.

The IAS Project Management Plan shall describe the Offeror’s general approach to performing a snapshot IV&V. The Offeror shall use the sample deliverables in Attachment J to create an MS Word document (MS Word 2007 or higher) that provides a project framework to deliver the tasks and deliverables within the time described in Attachment J.

The Offeror shall also provide a project schedule in MS Project 2007 or higher which provides the following:

1. A Work Breakdown Structure
2. A Project Schedule, based on WBS, to accomplish the work within the timeframe constraints described in Attachment K
3. A resource loading which illustrates how the Offeror plans to staff the project

**3.4.2.9. Section 7: Staffing Plan**

The Offeror shall provide a Staffing Plan describing how the Offeror intends to staff future TORFPs to meet the State’s needs. Use the sample TORFP description provided in Attachment J as a basis for this Staffing Plan. As part of the Staffing Plan, the Offeror shall include the Offeror’s strategy for using in-house resources, subcontractors, or both.

**3.4.2.10. Section 8: Past Performance**

This section shall include the following:

1. The Offeror shall provide evidence of its capabilities to provide the services outlined in Section 2.3 of this RFP.



2. The Offeror shall provide at least six (6) examples of successful projects (on time, within budget, within scope). The example(s) shall include the project name, the services provided, project cost and the objectives satisfied. The example(s) shall demonstrate the Offeror meets the minimum qualifications in Section 2.4.
3. For each example project provided, the Offeror shall include a supporting reference with the following information:
  - a. Name of client organization;
  - b. Name, title, and current telephone number of point of contact for client organization who is knowledgeable regarding Offeror's services;
  - c. Type and duration of contract(s) supporting the reference; and
  - d. The services provided, scope of the contract, and performance objectives satisfied as they relate to the scope of this RFP.
4. State of Maryland Experience: If applicable, the Offeror 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 Offeror 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, and if yes, the reason(s) why;
  - f. Whether any available renewal option was not exercised; and
  - g. The State employee contact person (name, telephone number and email).

**Please Note: It is critical that the contact information provided for any reference is current and accurate. The reference must be knowledgeable of the project and the Offeror's performance and available to discuss the Offeror's performance.**

**3.4.2.11. Section 9: Insurance Submission**

Provide proof of insurance described in Section 2.12

**3.4.2.12. Section 10: Required Attachments**

1. Attachment B- Completed Bid/Proposal Affidavit
2. Attachment D-1A- Completed signed and unedited Master Contractor Acknowledgement of Task Order MBE Requirements form
3. Attachment F – Completed Conflict of Interest Affidavit

### 3.5 VOLUME II - PRICE PROPOSAL

Under separate sealed cover from the Technical Proposal and clearly identified in the format requirements identified in Section 3.3, the Offeror shall submit one (1) unbound original, one (1) copy, and an electronic version in MS Excel and signed PDF of the Price Proposal. The Price Proposal shall contain all cost information in the format specified in:

- **Attachment E** Price Proposal

Complete the cost sheets only as provided in the Price Proposal Instructions. Offerors shall propose pricing for all labor categories to be considered for Award. **Failure to fully complete or sign the Price Proposal may result in the Offeror's proposal being deemed not susceptible for award.**

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## **SECTION 4 - EVALUATION CRITERIA AND SELECTION PROCEDURE**

### **4.1 EVALUATION CRITERIA**

Master Contracts will be awarded to not more than six (6) Offerors in accordance with the Competitive Sealed Proposals procurement process under Code of Maryland Regulations 21.05.03.

### **4.2 TECHNICAL EVALUATION CRITERIA**

If the minimum qualifications in Section 2.4 of the RFP are met, the following technical criteria shall be used to evaluate proposals in descending order of importance:

1. Length and relevance of Offeror's IAS experience. Relevance will be determined by the alignment of experience with programs of similar size, complexity, and subject matter. (Section 3.4.2.10);
2. Soundness of the proposed IAS methodology (ies). Soundness will be determined by the Offeror's ability to articulate an IAS methodology (ies), how the proposed IAS methodology would be applied to target projects, its adherence to industry-accepted standards, and potential to deliver quality IAS services. (Section 3.4.2.5);
3. Written and verbal presentation skills. The key deliverables for this Master Contract are written and verbal presentations and the Offeror shall demonstrate in its proposal and in its oral presentation the quality and skill that it can provide in these key areas;
4. The Offeror's overall level of understanding of the SOW (Section 2) of this RFP. The level of SOW understanding shall be determined by the quality and accuracy of the Technical Proposal and the Offeror's adherence to prescribed formatting requirements. (Sections 3.4.2.3-3.4.2.5); and
5. The quality and completeness of the Offeror's Risk Assessment, Project Management Plan, Work Breakdown Structure, and Staffing plan (Sections 3.4.2.7-3.4.2.9)

### **4.3 FINANCIAL CRITERIA**

Price Proposals will be evaluated separately. Offerors shall propose prices for **all** labor categories, for Contract years 1 through 7 regardless of an Offeror's ability to provide resources for the labor category. These are the maximum prices the State will pay for all proposed labor categories.

### **4.4 RECIPROCAL PREFERENCE**

Although Maryland law does not authorize procuring agencies to favor resident Offerors in awarding procurement contracts, many other states do grant their resident businesses preferences over Maryland contractors. Therefore, as described in COMAR 21.05.01.04, a resident business preference will be given if a responsible Offeror whose headquarters, principal base of operations, or principal site that will primarily provide the services required under this RFP that is in another state submits the most advantageous offer; the other state gives a preference to its residents through law, policy, or practice; and, the preference does not conflict with a Federal law or grant affecting the procurement contract. The preference given shall be identical to the preference that the other state, through law, policy or practice gives to its residents.

## **4.5 SELECTION PROCEDURES**

### 4.5.1 General Selection Process

Master Contracts will be awarded in accordance with the Competitive Sealed Proposals process under Code of Maryland Regulations 21.05.03. The Competitive Sealed Proposals method is based on discussions and potential revision of proposals based on such discussions.

Accordingly, the State may hold discussions with all Offerors judged reasonably susceptible of being selected for award, or potentially so. However, the State also reserves the right to make an award without holding discussions. In either case of holding discussions or not doing so, the State may determine an Offeror to be not responsible and/or an Offeror's proposal to be not reasonably susceptible of being selected for award, at any time after the initial closing date for receipt of proposals and the review of those proposals. If the State finds an Offeror to be not responsible and/or an Offeror's Technical Proposal to be not reasonably susceptible of being selected for award, an Offeror's Price Proposal will be returned unopened.

### 4.5.2 Selection Process Sequence

1. RFP Section 3.4.2.5 (Proposal Section 4: Compliance with Master Contractor Minimal Requirements) of each Technical Proposal will be reviewed to determine if the Offeror has met the minimum qualifications found in Section 2.4. Those Offerors whose Technical Proposals were found not reasonably susceptible for award will be dropped from competition, notified by email as soon as possible and their Price Proposals returned unopened.
2. Technical Proposals are evaluated for technical merit and ranked. During this review, oral presentations and discussions may be held. The purpose of such discussions will be to assure a full understanding of DoIT's requirements and the Offeror's ability to perform. For scheduling purposes, Offerors shall be prepared to make an oral presentation and participate in discussions within five (5) days of the delivery of proposals to DoIT. Qualified Offerors will be contacted by DoIT as soon as discussions are scheduled.
3. During the course of any potential discussions, an Offeror shall confirm in writing any substantive oral clarification of, or change in, its proposals. Any such written clarification or change then becomes part of the Offeror's proposal. Proposals are given a final review and ranked.
4. The Price Proposal of each qualified Offeror will be evaluated separately from the technical evaluation. After a review of the Price Proposals of qualified Offerors, the evaluation committee or Procurement Officer may again conduct discussions to further evaluate the Offeror's entire proposal.
5. When in the best interest of the State, the Procurement Officer may permit Offerors who have submitted acceptable proposals to revise their initial proposals and submit, in writing, best and final offers (BAFOs). However, the State may make an award without requesting BAFOs.

### 4.5.3 Award Determination

The contract shall be awarded to up to six Offerors with the proposal found most advantageous to the State, considering the combination of technical and price submissions. In making this selection, technical merit will receive greater weight than price.

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**ATTACHMENTS LOCATED IN A SEPARATE FILE**